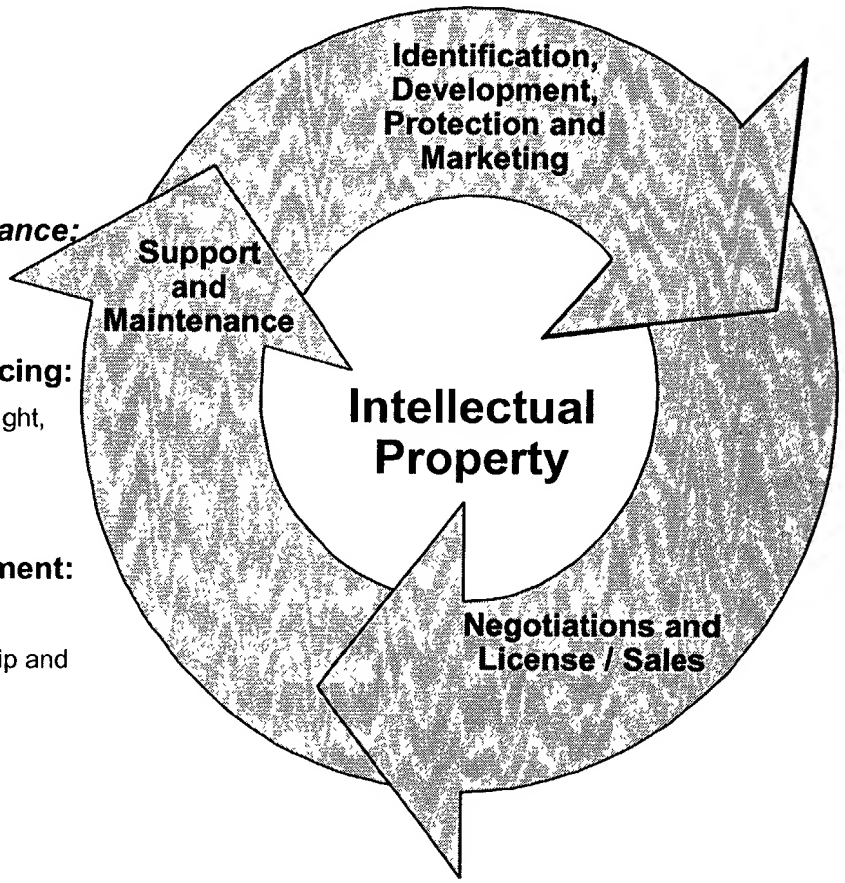
Continuous Intellectual Property Process

I. Identification, Development, Protection and Marketing:

- **Identification:**
  - Identify new intellectual property (inventions, technology, ideas, brands)
  - Identify potential marketing opportunities
- **Development:**
  - Develop inventions, technology, ideas for IP protection
  - Develop marketing sales channels
- **Protection:**
  - Protect IP with patents, copyrights, trade secrets, trademarks
  - Protect with Non-Disclosure Agreements
- **Marketing:**
  - Market & competitive analysis
  - Financial analysis

II. Negotiations and License/Sales:

- **IP Negotiations (e.g., with customers, government agencies)**
- **License / Sales Initiation**
  - Contact vendors
  - Contact end users
- **Contract development, negotiation and completion**



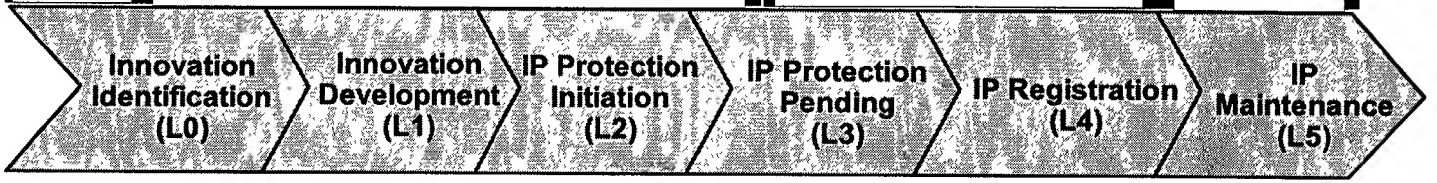
III. Support and Maintenance:

- **Internal reward and recognition programs**
- **IP protection and policing:**
  - Patent, trademark, copyright, trade secret, portfolio management
  - Policing IP
- **Relationship Management:**
  - Internal Entities
  - External Sales Partnership and End Users
- **Royalty Management**
- **Quality Standards Management**

FIG. 1

IP Protection Life Cycle

Continuous IP Process: Support | Identification, Development and Protection | Negotiations and Sales | Maintenance



	Innovation Identification (L0)	Innovation Development (L1)	IP Protection Initiation (L2)	IP Protection Pending (L3)	IP Registration (L4)	IP Maintenance (L5)
Effort Spent:	• 1-2 hours/product	• 1-2 hours • 3-5 hours • 1-2 hours	• 3-5 hours/patent 3-5 hours/trademark 1 hour/copyright	• 3-5 hours/patent 4-6 hours/trademark 1 hour/copyright	• 3-5 hours/patent 1-2 hours/trademark 1 hour/copyright	• 1-2 hours
Time Elapsed (per level):	• 1-5 days	• 1-5 days	• 3-5 months/patent 1-5 days/trademark 1-5 days/copyright	• 18-24 months/patent 6-12 mos/trademark 2-3 months/copyright	• 1-5 days/patent 1-5 days/trademark 1-5 days/copyright	• 1 day + periodic
Time Elapsed (total):	• <1 week	• 1-2 weeks	• 4-6 months/patent 1-3 mos/trademark 3-4 weeks/copyright	• 22-30 months/patent 12-18 mos/trademark 3-4 months/copyright	• 2-2.5 years/patent 1-3.5 yrs/trademark 3-4 months/copyright	• 20 years/patent 5-10 years/trademark 10 years/copyright

Note: Trade secrets need not be registered, but reasonable steps must be taken to keep secret, including proper markings and use of Non-Disclosure Agreements.

IP Protection Activities:	• Internal awareness and education • Internal relationship building • Identify protection opportunities • Identify type of protection(s) needed • Catalog and qualify opportunities • Notification to IP Marketing for marketing • IP Protection team member assigned	• Further educate innovation generator on information needed for IP protection • Assist innovation generator in getting innovation to point for protection with IP • Assist IP Marketing with technical understanding • Disclosure form received • Clearance Searches	• Assess disclosure form • Notification to IP Protection legal • Verify disclosure award received (if any) • Follow up with innovation generator and legal • Application filed	• Verify filing award received (if any) • Assist innovation generator with issues relating to using innovation while IP protection pending • Follow up with legal regarding status • Review written documents from government agency where application filed & assist in response	• Assist in notification to innovation generator • Assist innovation generator in marking innovation with registration information • Assist innovation generator in understanding extent of IP protection • Verify registration	• Verify issuance award received (if any) • Record all relevant IP information • Internal follow up • IP policing
Measures:	• Innovations identified (#/types) • Quality of innovations	• # Disclosures • Innovation attributes known and cataloged	• # Applications filed • Quality of applications	• Proper innovation usage during IP • Pendency	• # Registration • Proper markings	• IP attributes cataloged

FIG. 2

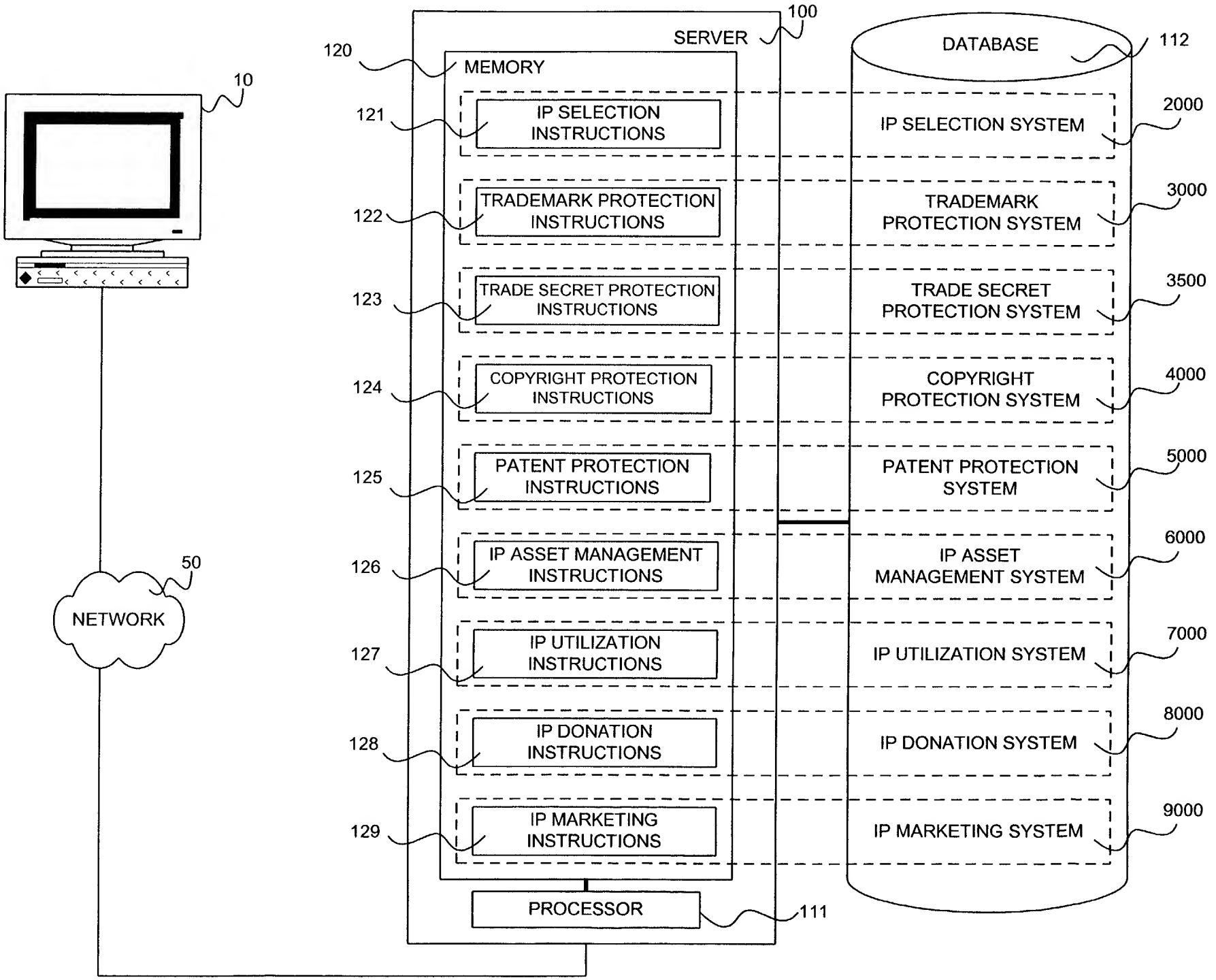
October 1999

IP Marketing Life Cycle

Continuous IP Process: Support | Identification, Development, Protection and Marketing | Negotiations and Sales | Maintenance

	Potential Opportunity Identification (L0)	Initial Research in Progress (L1)	Awaiting Execution of Pre-Transaction Report (L2)	Negotiations w/External Party in Progress (L3)	Awaiting Execution Agreement/ Transaction Report (L4)	Closed Deal Maintenance (L5)
Effort Spent:	• 1-5 days	• 7-10 days	• 7-10 days	• 1-5 months	• 7-10 days	• 1 day + ongoing
Time Elapsed (per level):	• 1-2 hours/product	• 5-10 hours/product	• 5-10 hours/deal	• 10-50 hours/deal	• 1-2 hours/deal	• 1-2 hours/deal +
Time Elapsed (total)l:	• <1 week	• 1-2 weeks	• 2-3 weeks	• 2-6 months	• 2-6 months	• 2-6 months
IP Marketing Activities:	• Internal awareness and education • Internal relationship building • Identify potential marketing opportunities • Catalog and qualify potential opportunities • Notification to IP Protection for disclosure • IP Marketing team member assigned	• Begin market research • Follow-up interview with SME • Begin product scorecard research • Assess competitive environment • Initial valuation of product • Prioritize product within portfolio • Make Go-No Go decision • Begin to get internal buy-in • Draft & submit PTR	• Conduct in-depth interview with SME & continue to build relationship • Begin channel strategy • Continue competitive research and valuation of product • Initiate contact with chosen sales partners/ end users • Utilize NDAs • Protect IP prior to disclosing (when possible)	• Continue product valuation, market research, & channel strategy • Create product overview presentation (external) • Determine structure & pricing of deal • Begin and complete negotiations / contracts • Draft & submit Transaction Report	• Finalize fine points of contract • Manage technical and logistic issues of product	• Sign contracts • Record all relevant product information • Record all relevant deal information • Track royalties • Sales partner / end user relationship management • Internal follow up • Quality standards management • IP policing
Measures:	• Products identified • Quality of products	• Product attributes known & cataloged	• PTR for all deals	• Accuracy of valuations • Terms of deals • # times contract reworked	• TR for all deals	• Revenues • % licensed with patent protection • Deal attributes cataloged

FIG. 3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50
NETWORK
100
SERVER
120
MEMORY
121
IP SELECTION INSTRUCTIONS
122
TRADEMARK PROTECTION INSTRUCTIONS
123
TRADE SECRET PROTECTION INSTRUCTIONS
124
COPYRIGHT PROTECTION INSTRUCTIONS
125
PATENT PROTECTION INSTRUCTIONS
126
IP ASSET MANAGEMENT INSTRUCTIONS
127
IP UTILIZATION INSTRUCTIONS
128
IP DONATION INSTRUCTIONS
129
IP MARKETING INSTRUCTIONS
PROCESSOR
111
DATABASE
112
IP SELECTION SYSTEM
2000
TRADEMARK PROTECTION SYSTEM
3000
TRADE SECRET PROTECTION SYSTEM
3500
COPYRIGHT PROTECTION SYSTEM
4000
PATENT PROTECTION SYSTEM
5000
IP ASSET MANAGEMENT SYSTEM
6000
IP UTILIZATION SYSTEM
7000
IP DONATION SYSTEM
8000
IP MARKETING SYSTEM
9000

FIG. 4

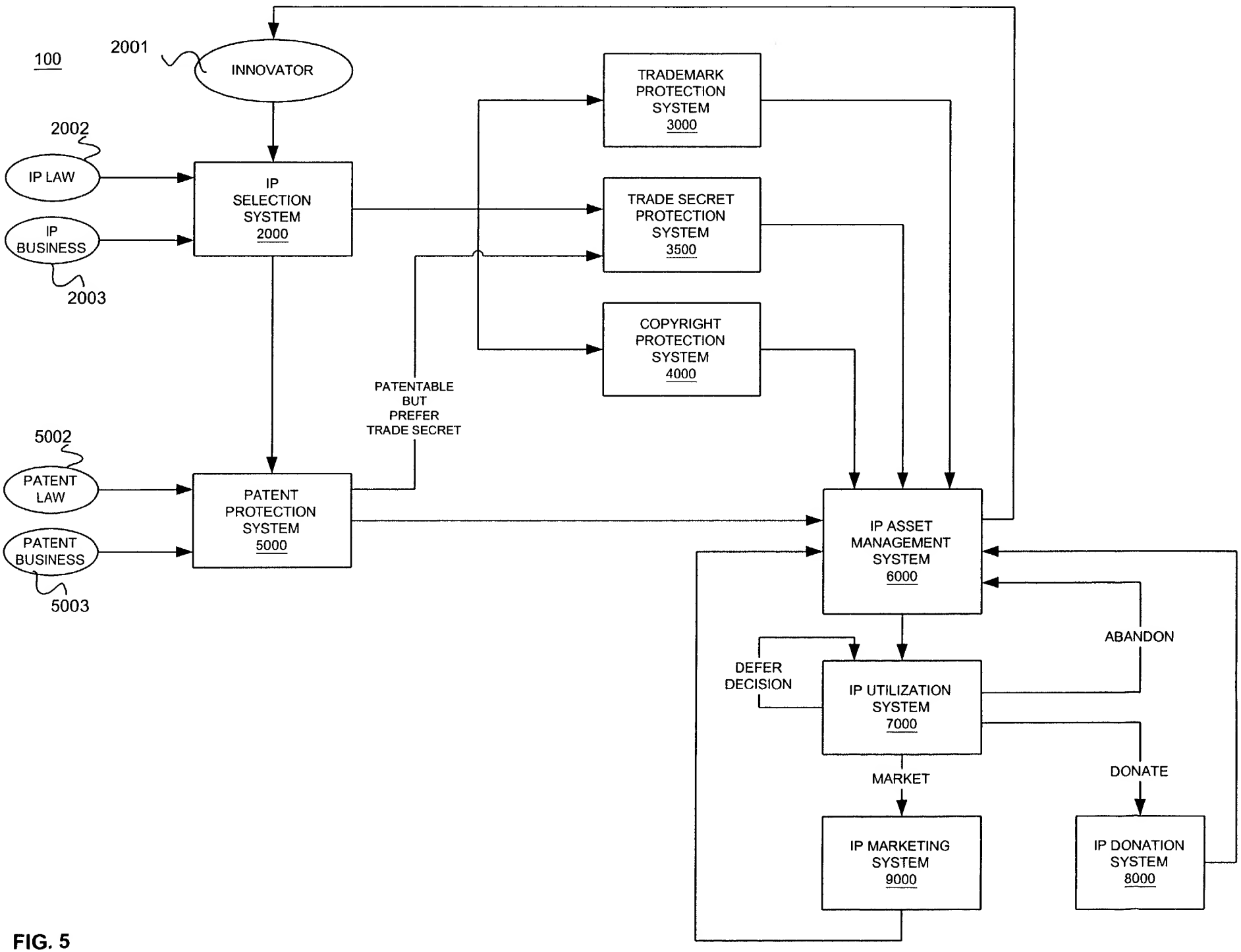

100
2001
INNOVATOR
2002
IP LAW
IP BUSINESS
2003
IP SELECTION SYSTEM 2000
TRADEMARK PROTECTION SYSTEM 3000
TRADE SECRET PROTECTION SYSTEM 3500
COPYRIGHT PROTECTION SYSTEM 4000
PATENTABLE BUT PREFER TRADE SECRET
5002
PATENT LAW
PATENT BUSINESS
5003
PATENT PROTECTION SYSTEM 5000
IP ASSET MANAGEMENT SYSTEM 6000
DEFER DECISION
IP UTILIZATION SYSTEM 7000
ABANDON
MARKET
DONATE
IP MARKETING SYSTEM 9000
IP DONATION SYSTEM 8000

FIG. 5

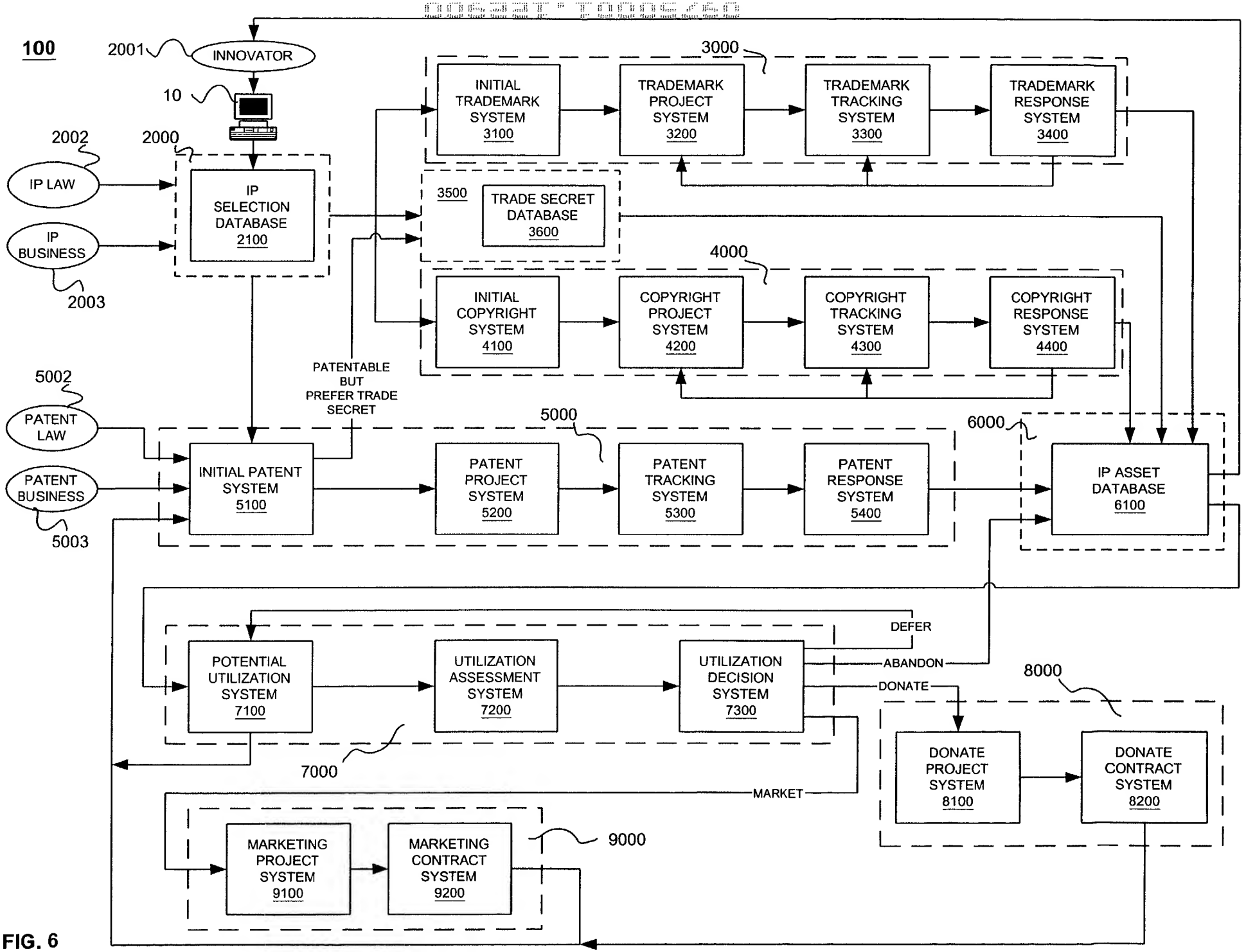
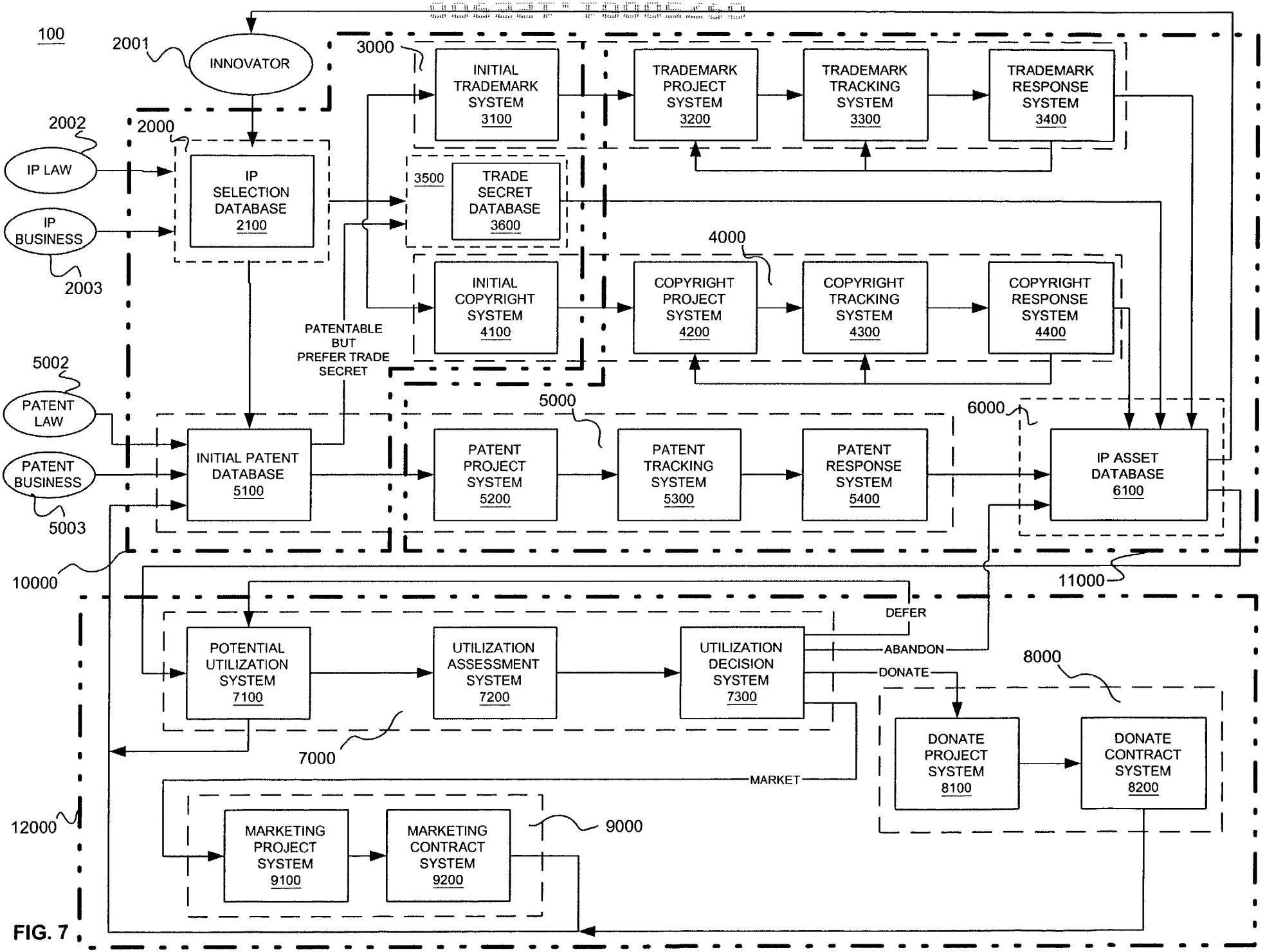

100
2001
INNOVATOR
10
2002
IP LAW
IP BUSINESS
2003
2000
IP SELECTION DATABASE 2100
3000
INITIAL TRADEMARK SYSTEM 3100
TRADEMARK PROJECT SYSTEM 3200
TRADEMARK TRACKING SYSTEM 3300
TRADEMARK RESPONSE SYSTEM 3400
3500
TRADE SECRET DATABASE 3600
4000
INITIAL COPYRIGHT SYSTEM 4100
COPYRIGHT PROJECT SYSTEM 4200
COPYRIGHT TRACKING SYSTEM 4300
COPYRIGHT RESPONSE SYSTEM 4400
PATENTABLE BUT PREFER TRADE SECRET
5002
PATENT LAW
PATENT BUSINESS
5003
5000
INITIAL PATENT SYSTEM 5100
PATENT PROJECT SYSTEM 5200
PATENT TRACKING SYSTEM 5300
PATENT RESPONSE SYSTEM 5400
6000
IP ASSET DATABASE 6100
DEFER
ABANDON
DONATE
POTENTIAL UTILIZATION SYSTEM 7100
UTILIZATION ASSESSMENT SYSTEM 7200
UTILIZATION DECISION SYSTEM 7300
7000
8000
DONATE PROJECT SYSTEM 8100
DONATE CONTRACT SYSTEM 8200
MARKET
MARKETING PROJECT SYSTEM 9100
MARKETING CONTRACT SYSTEM 9200
9000

FIG. 6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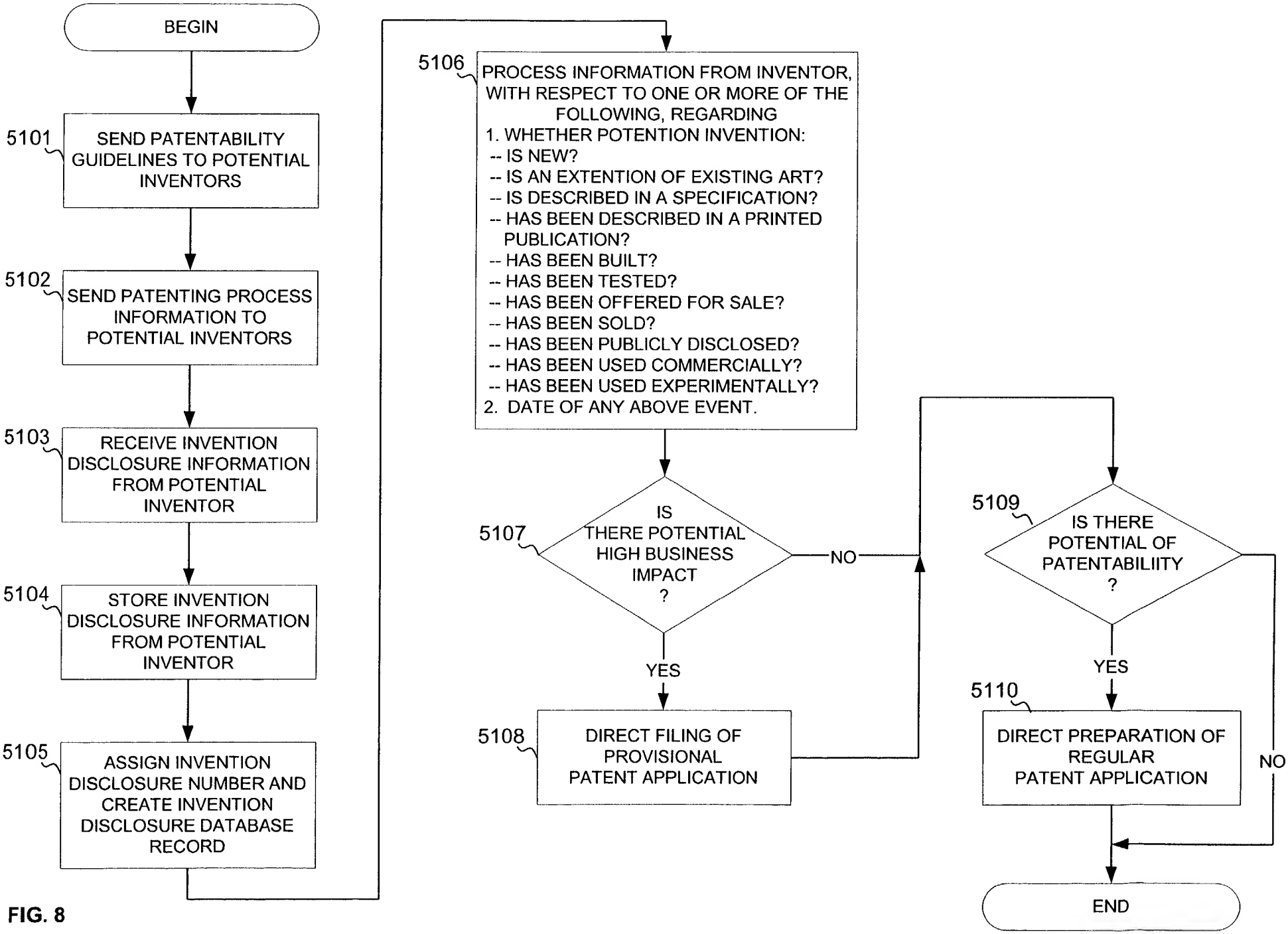
2001
INNOVATOR
3000
INITIAL TRADEMARK SYSTEM 3100
TRADEMARK PROJECT SYSTEM 3200
TRADEMARK TRACKING SYSTEM 3300
TRADEMARK RESPONSE SYSTEM 3400
2002
2000
IP LAW
IP SELECTION DATABASE 2100
IP BUSINESS
2003
3500
TRADE SECRET DATABASE 3600
4000
INITIAL COPYRIGHT SYSTEM 4100
COPYRIGHT PROJECT SYSTEM 4200
COPYRIGHT TRACKING SYSTEM 4300
COPYRIGHT RESPONSE SYSTEM 4400
PATENTABLE BUT PREFER TRADE SECRET
5002
PATENT LAW
PATENT BUSINESS
5003
INITIAL PATENT DATABASE 5100
5000
PATENT PROJECT SYSTEM 5200
PATENT TRACKING SYSTEM 5300
PATENT RESPONSE SYSTEM 5400
6000
IP ASSET DATABASE 6100
10000
11000
DEFER
ABANDON
DONATE
POTENTIAL UTILIZATION SYSTEM 7100
UTILIZATION ASSESSMENT SYSTEM 7200
UTILIZATION DECISION SYSTEM 7300
8000
DONATE PROJECT SYSTEM 8100
DONATE CONTRACT SYSTEM 8200
7000
MARKET
12000
MARKETING PROJECT SYSTEM 9100
MARKETING CONTRACT SYSTEM 9200
9000

FIG. 7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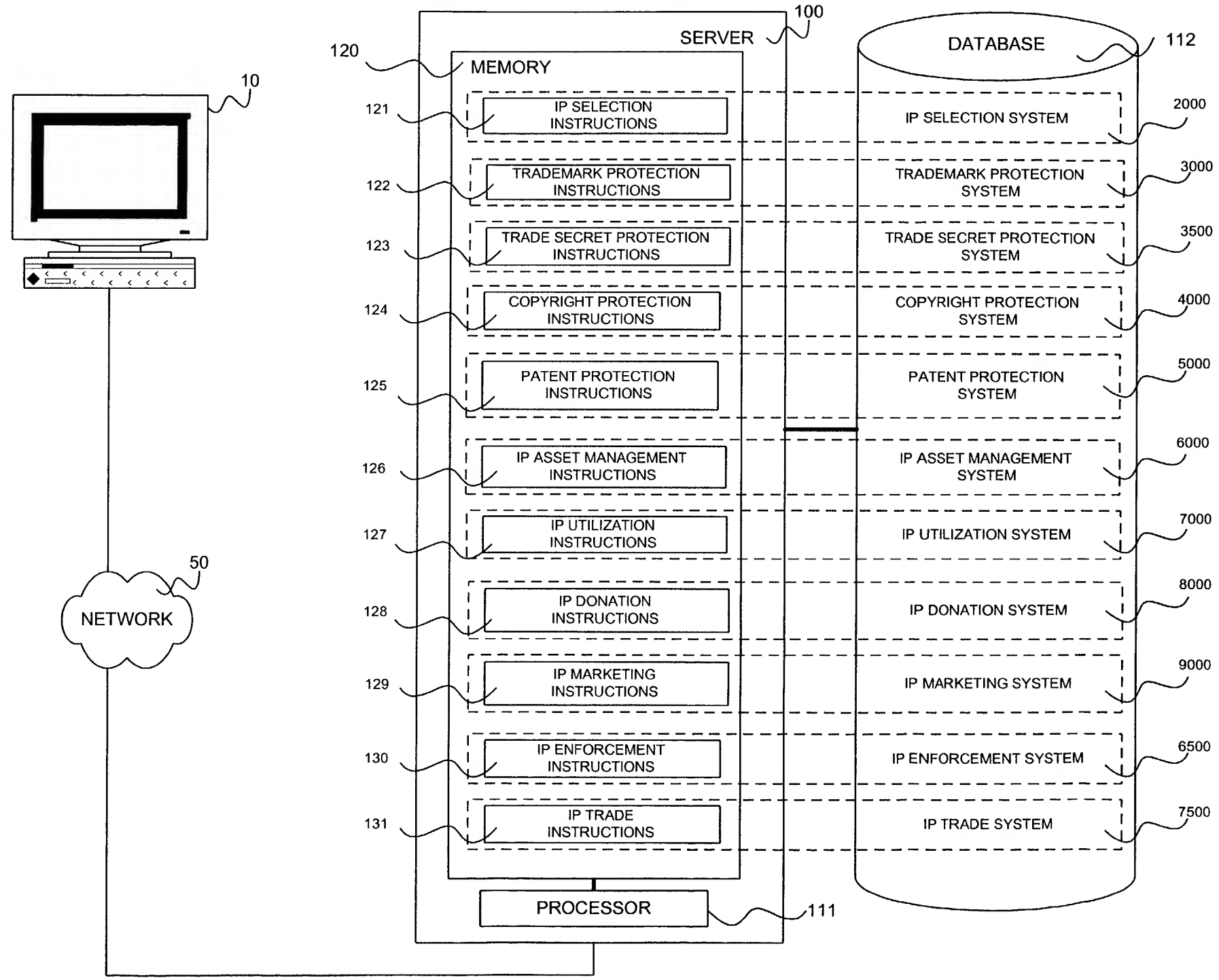
5101
SEND PATENTABILITY GUIDELINES TO POTENTIAL INVENTORS
5102
SEND PATENTING PROCESS INFORMATION TO POTENTIAL INVENTORS
5103
RECEIVE INVENTION DISCLOSURE INFORMATION FROM POTENTIAL INVENTOR
5104
STORE INVENTION DISCLOSURE INFORMATION FROM POTENTIAL INVENTOR
5105
ASSIGN INVENTION DISCLOSURE NUMBER AND CREATE INVENTION DISCLOSURE DATABASE RECORD
5106
PROCESS INFORMATION FROM INVENTOR, WITH RESPECT TO ONE OR MORE OF THE FOLLOWING, REGARDING
1. WHETHER POTENTION INVENTION:
-- IS NEW?
-- IS AN EXTENTION OF EXISTING ART?
-- IS DESCRIBED IN A SPECIFICATION?
-- HAS BEEN DESCRIBED IN A PRINTED PUBLICATION?
-- HAS BEEN BUILT?
-- HAS BEEN TESTED?
-- HAS BEEN OFFERED FOR SALE?
-- HAS BEEN SOLD?
-- HAS BEEN PUBLICLY DISCLOSED?
-- HAS BEEN USED COMMERCIALLY?
-- HAS BEEN USED EXPERIMENTALLY?
2. DATE OF ANY ABOVE EVENT.
5107
IS THERE POTENTIAL HIGH BUSINESS IMPACT ?
NO
YES
5108
DIRECT FILING OF PROVISIONAL PATENT APPLICATION
5109
IS THERE POTENTIAL OF PATENTABILIITY ?
YES
NO
5110
DIRECT PREPARATION OF REGULAR PATENT APPLICATION
END

FIG. 8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SERVER
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MEMORY
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IP SELECTION INSTRUCTIONS
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TRADEMARK PROTECTION INSTRUCTIONS
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TRADE SECRET PROTECTION INSTRUCTIONS
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COPYRIGHT PROTECTION INSTRUCTIONS
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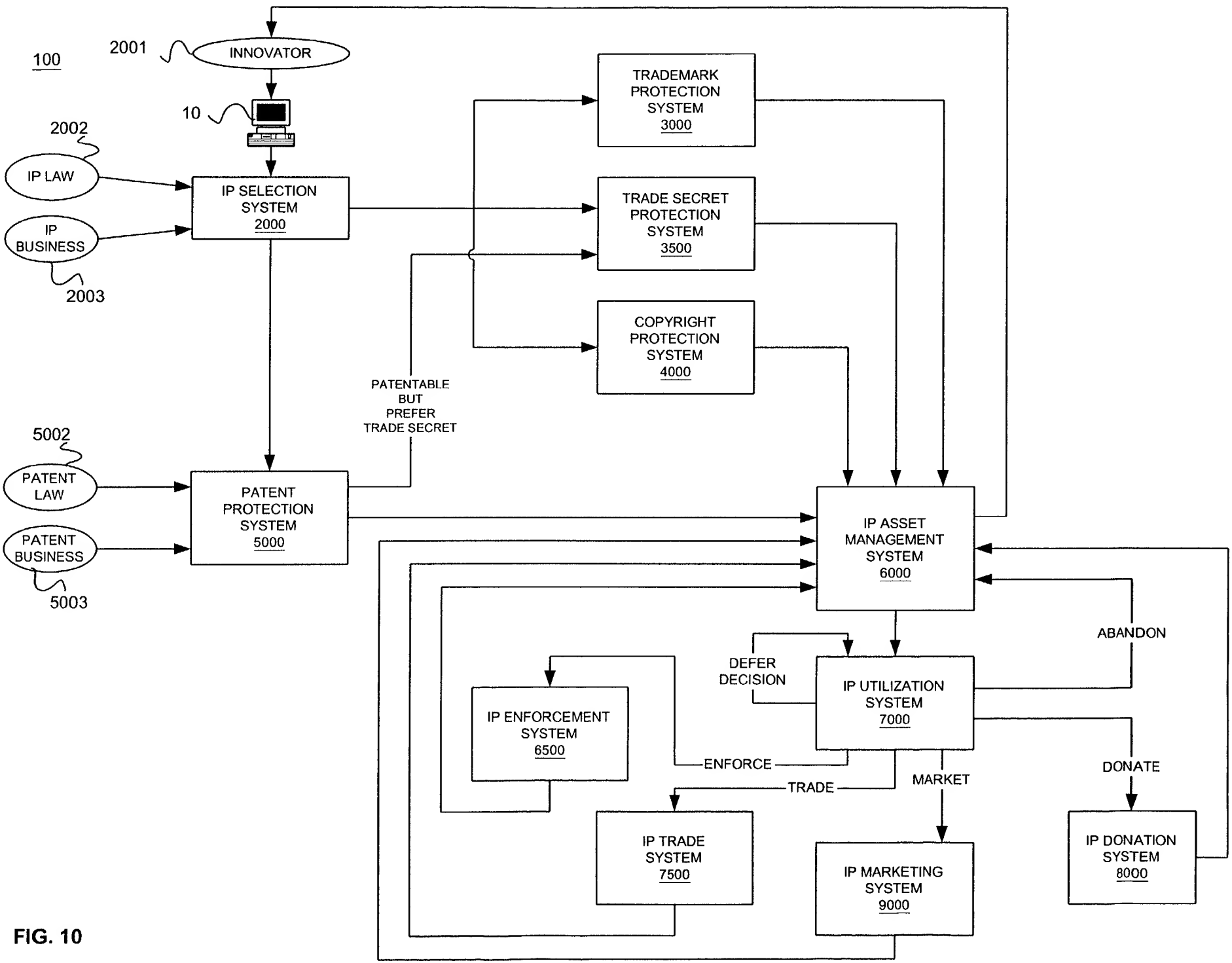
PATENT PROTECTION INSTRUCTIONS
126
IP ASSET MANAGEMENT INSTRUCTIONS
127
IP UTILIZATION INSTRUCTIONS
128
IP DONATION INSTRUCTIONS
129
IP MARKETING INSTRUCTIONS
130
IP ENFORCEMENT INSTRUCTIONS
131
IP TRADE INSTRUCTIONS
PROCESSOR
111
DATABASE
112
IP SELECTION SYSTEM
2000
TRADEMARK PROTECTION SYSTEM
3000
TRADE SECRET PROTECTION SYSTEM
3500
COPYRIGHT PROTECTION SYSTEM
4000
PATENT PROTECTION SYSTEM
5000
IP ASSET MANAGEMENT SYSTEM
6000
IP UTILIZATION SYSTEM
7000
IP DONATION SYSTEM
8000
IP MARKETING SYSTEM
9000
IP ENFORCEMENT SYSTEM
6500
IP TRADE SYSTEM
7500

FIG. 9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2001
INNOVATOR
10
2002
IP LAW
IP BUSINESS
2003
IP SELECTION SYSTEM 2000
TRADEMARK PROTECTION SYSTEM 3000
TRADE SECRET PROTECTION SYSTEM 3500
COPYRIGHT PROTECTION SYSTEM 4000
PATENTABLE BUT PREFER TRADE SECRET
5002
PATENT LAW
PATENT BUSINESS
5003
PATENT PROTECTION SYSTEM 5000
IP ASSET MANAGEMENT SYSTEM 6000
ABANDON
DEFER DECISION
IP UTILIZATION SYSTEM 7000
IP ENFORCEMENT SYSTEM 6500
ENFORCE
TRADE
MARKET
DONATE
IP TRADE SYSTEM 7500
IP MARKETING SYSTEM 9000
IP DONATION SYSTEM 8000

FIG. 10

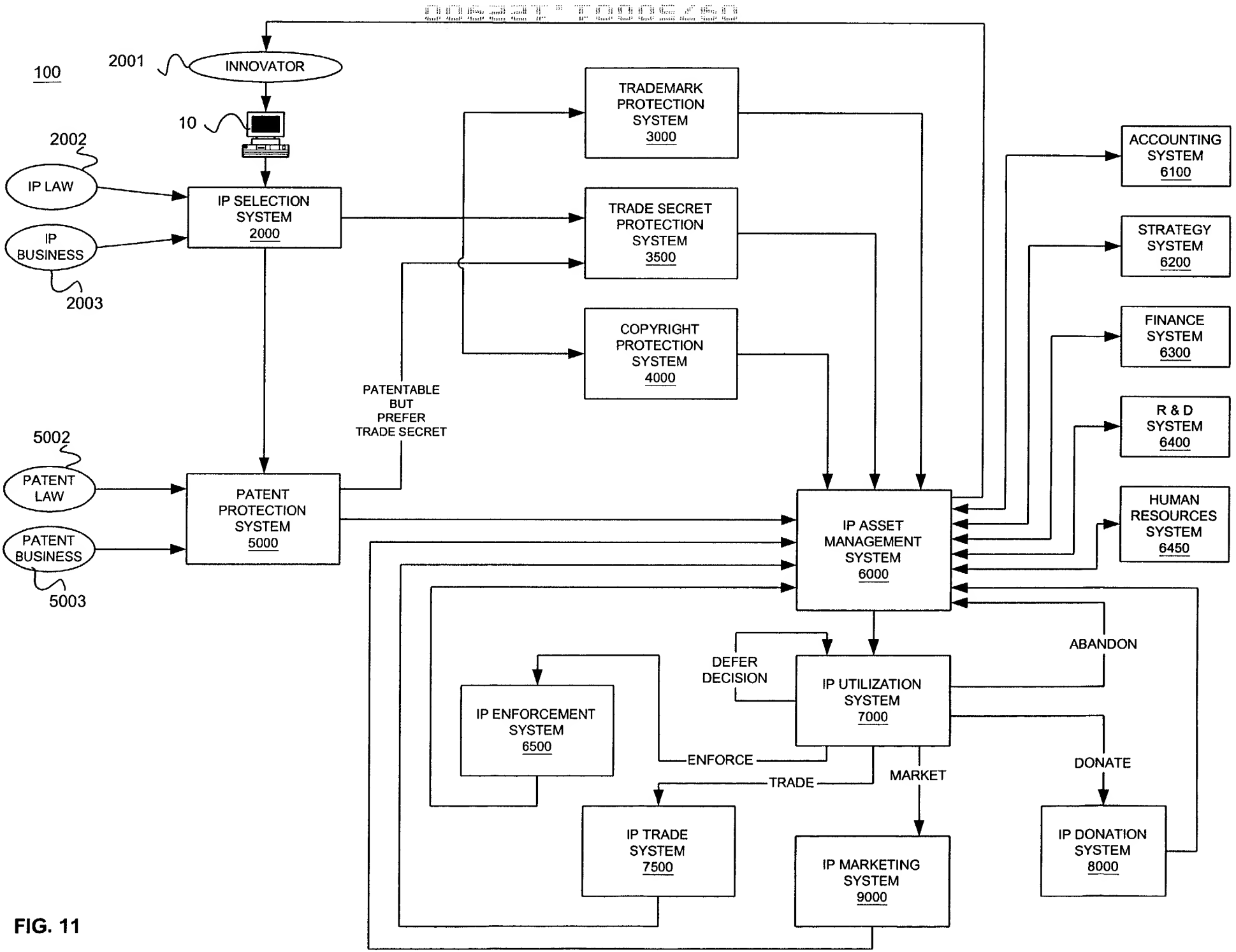
100
2001
INNOVATOR
10
2002
IP LAW
IP BUSINESS
2003
IP SELECTION SYSTEM 2000
TRADEMARK PROTECTION SYSTEM 3000
TRADE SECRET PROTECTION SYSTEM 3500
COPYRIGHT PROTECTION SYSTEM 4000
PATENTABLE BUT PREFER TRADE SECRET
5002
PATENT LAW
PATENT BUSINESS
5003
PATENT PROTECTION SYSTEM 5000
ACCOUNTING SYSTEM 6100
STRATEGY SYSTEM 6200
FINANCE SYSTEM 6300
R & D SYSTEM 6400
HUMAN RESOURCES SYSTEM 6450
IP ASSET MANAGEMENT SYSTEM 6000
DEFER DECISION
ABANDON
IP UTILIZATION SYSTEM 7000
IP ENFORCEMENT SYSTEM 6500
ENFORCE
TRADE
MARKET
DONATE
IP TRADE SYSTEM 7500
IP MARKETING SYSTEM 9000
IP DONATION SYSTEM 8000

FIG. 11

US 2008/0243687 A1 Oct. 2, 2008

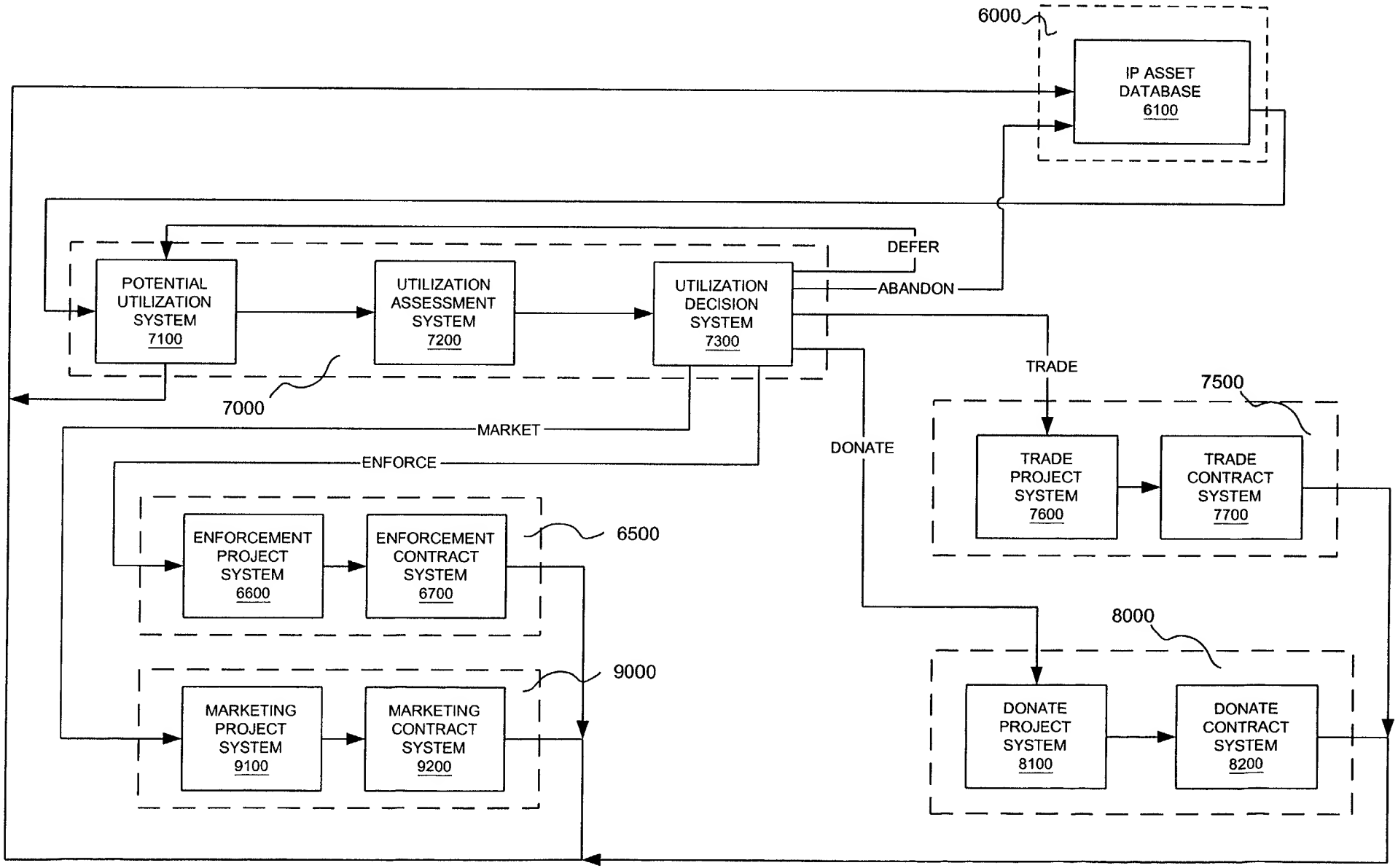

FIG. 12

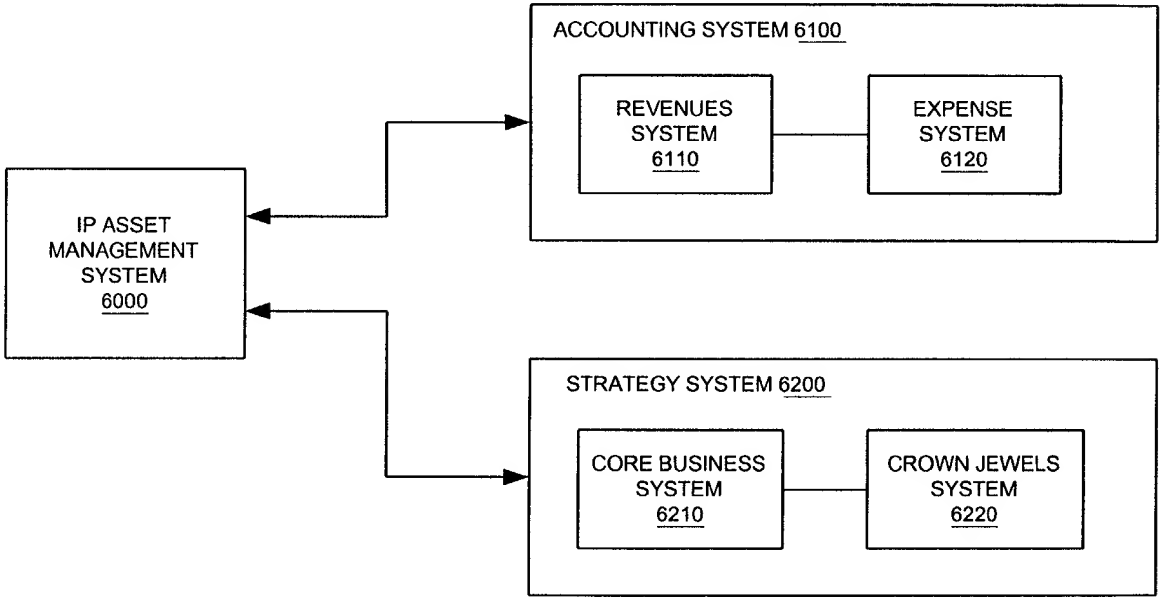
ACCOUNTING SYSTEM 6100
REVENUES SYSTEM 6110
EXPENSE SYSTEM 6120
IP ASSET MANAGEMENT SYSTEM 6000
STRATEGY SYSTEM 6200
CORE BUSINESS SYSTEM 6210
CROWN JEWELS SYSTEM 6220

FIG. 13

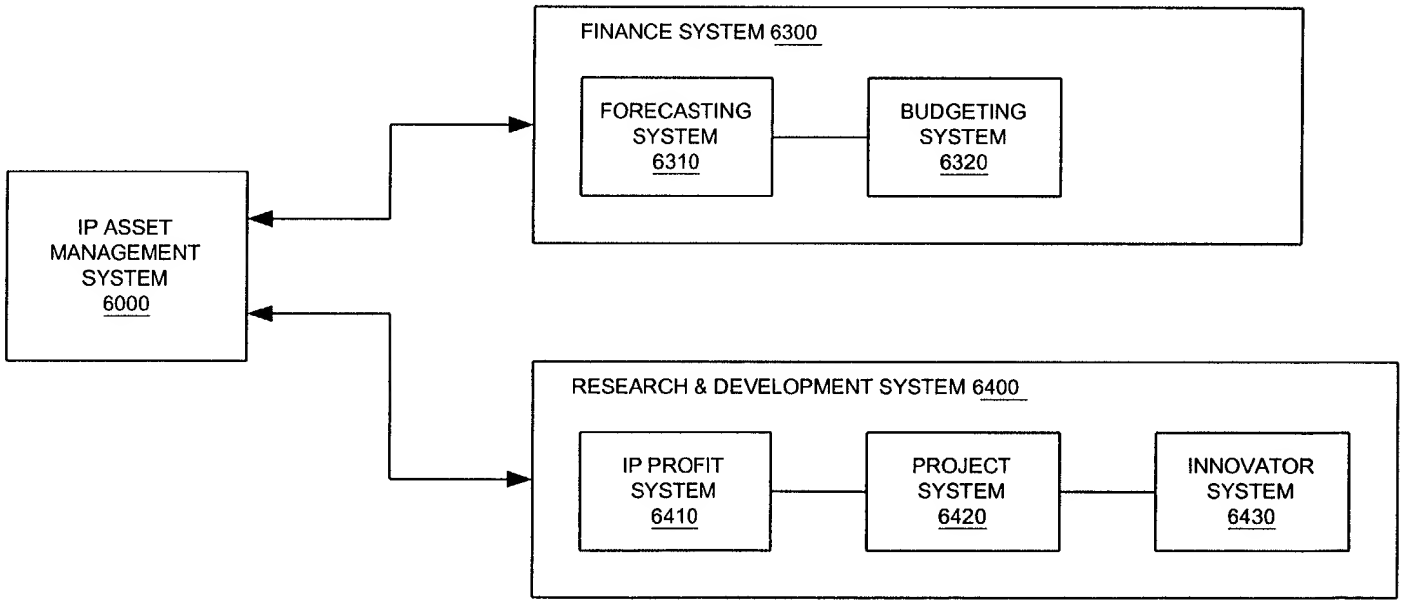
FINANCE SYSTEM 6300
FORECASTING SYSTEM 6310
BUDGETING SYSTEM 6320
IP ASSET MANAGEMENT SYSTEM 6000
RESEARCH & DEVELOPMENT SYSTEM 6400
IP PROFIT SYSTEM 6410
PROJECT SYSTEM 6420
INNOVATOR SYSTEM 6430

FIG. 14

	PRODUCT	B/U	LEAD	L1	L2	L3	L4	L5	L6	L7	L8	L9	L10	GOAL	$	%
1	PROD A	BU B	X						42					2001	3.5M	0.5
2	PROD B	BU C	Z										45	4Q 00	1M	0.9
3	PROD C	BU A	Z				35							4Q 00	3.5M	0.25
4	PROD D	BU A	Y					35						4Q 00	3.5M+	0.5
5	PROD E	BU D	X					35						4Q 00	3.5M	0.05
6	PROD F	BU E	W					35								
7	PROD G	BU D	W		35											
8	PROD H	BU C	X					35						2001	500K	
9	PROD I	BU E	Z						35					2001		
10	PROD J	BU E	X					40						2001	5M	0.33
11	PROD K	BU B	W								47			2001	6M	0.9
12	PROD L	BU D	Y	31X										-----	-----	-----
13	PROD M	BU B	Y					35								
14	PROD N	BU A	W				38							2001		
15	PROD O	BU C	Y	36X										-----	-----	-----
				INITIAL RESEARCH	MARKET RESEARCH	PTR APPROVAL	MARKET PLAN	SELL	NEGOTIATE	TR APPROVAL	EXECUTE CONTRACT	SETUP CONTRACT	AUDIT CONTRACT			

FIG. 15

PROPRIETARY PROPOSAL

	PRODUCT	B/U	LEAD	L1	L2	L3	L4	L5	L6	L7	L8	L9	L10	GOAL	$	%
1	PROD F	BU E	W					35								
2	PROD G	BU D	W		35											
3	PROD K	BU B	W								47			2001	6M	0.9
4	PROD N	BU A	W				38							2001		
5	PROD A	BU B	X						42					2001	3.5M	0.5
6	PROD E	BU D	X					35						4Q 00	3.5M	0.05
7	PROD H	BU C	X					35						2001	500K	
8	PROD J	BU E	X					40						2001	5M	0.33
9	PROD D	BU A	Y					35						4Q 00	3.5M+	0.5
10	PROD L	BU D	Y	31X										-----	-----	-----
11	PROD M	BU B	Y					35								
12	PROD O	BU C	Y	36X										-----	-----	-----
13	PROD B	BU C	Z										45	4Q 00	1M	0.9
14	PROD C	BU A	Z				35							4Q 00	3.5M	0.25
15	PROD I	BU E	Z						35					2001		
				INITIAL RESEARCH	MARKET RESEARCH	PTR APPROVAL	MARKET PLAN	SELL	NEGOTIATE	TR APPROVAL	EXECUTE CONTRACT	SETUP CONTRACT	AUDIT CONTRACT			

FIG. 16

	PRODUCT	B/U	LEAD	L1	L2	L3	L4	L5	L6	L7	L8	L9	L10	GOAL	$	%
1	PROD B	BU C	Z										45	4Q 00	1M	0.9
2	PROD K	BU B	W								47			2001	6M	0.9
3	PROD A	BU B	X						42					2001	3.5M	0.5
4	PROD I	BU E	Z						35					2001		
5	PROD D	BU A	Y					35						4Q 00	3.5M+	0.5
6	PROD E	BU D	X					35						4Q 00	3.5M	0.05
7	PROD F	BU E	W					35								
8	PROD H	BU C	X					35						2001	500K	
9	PROD M	BU B	Y					35								
10	PROD J	BU E	X					40						2001	5M	0.33
11	PROD C	BU A	Z				35							4Q 00	3.5M	0.25
12	PROD N	BU A	W				38							2001		
13	PROD G	BU D	W		35											
14	PROD L	BU D	Y	31X										-----	-----	-----
15	PROD O	BU C	Y	36X										-----	-----	-----
				INITIAL RESEARCH	MARKET RESEARCH	PTR APPROVAL	MARKET PLAN	SELL	NEGOTIATE	TR APPROVAL	EXECUTE CONTRACT	SETUP CONTRACT	AUDIT CONTRACT			

FIG. 17

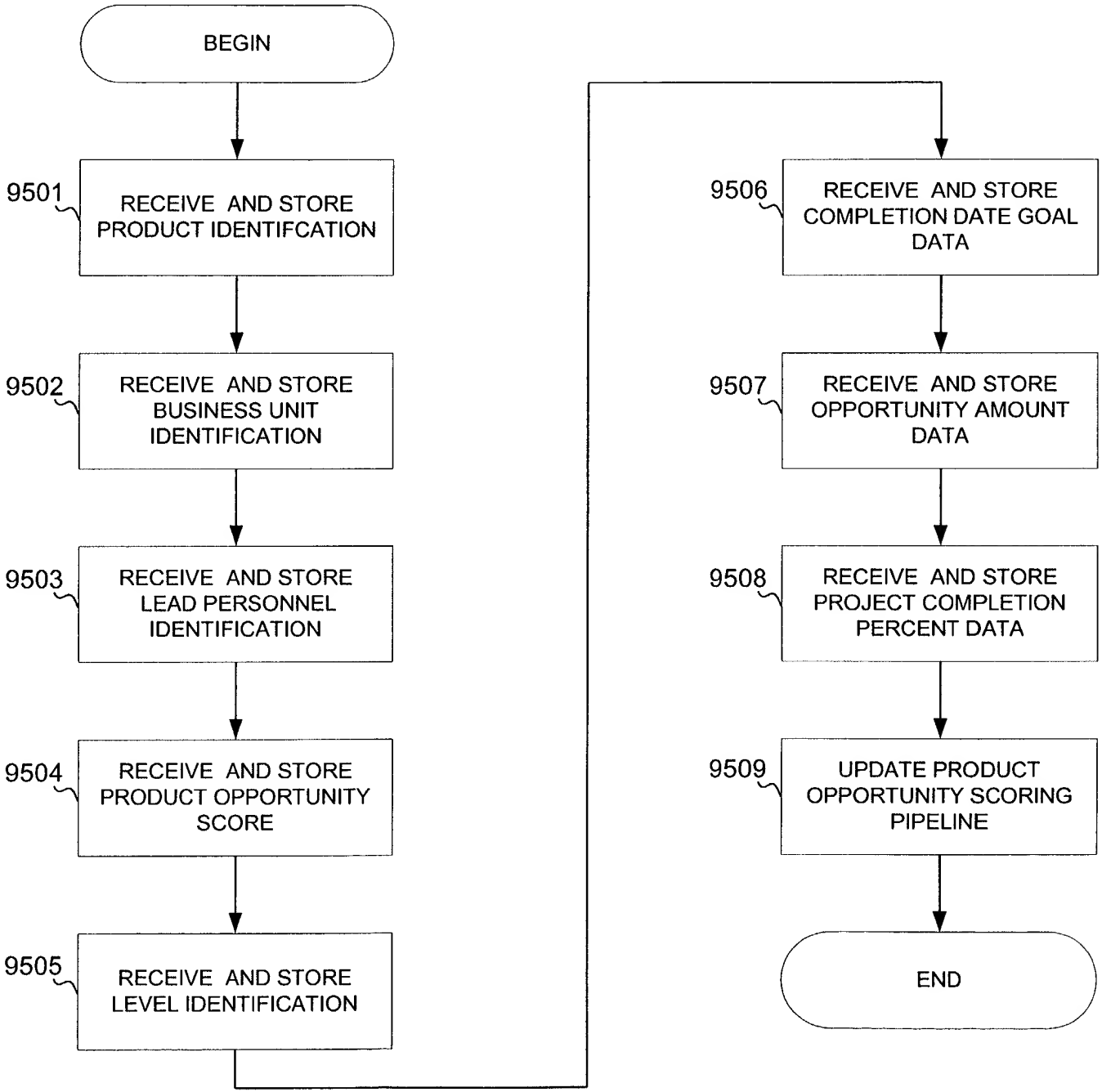
BEGIN
9501
RECEIVE AND STORE PRODUCT IDENTIFCATION
9502
RECEIVE AND STORE BUSINESS UNIT IDENTIFICATION
9503
RECEIVE AND STORE LEAD PERSONNEL IDENTIFICATION
9504
RECEIVE AND STORE PRODUCT OPPORTUNITY SCORE
9505
RECEIVE AND STORE LEVEL IDENTIFICATION
9506
RECEIVE AND STORE COMPLETION DATE GOAL DATA
9507
RECEIVE AND STORE OPPORTUNITY AMOUNT DATA
9508
RECEIVE AND STORE PROJECT COMPLETION PERCENT DATA
9509
UPDATE PRODUCT OPPORTUNITY SCORING PIPELINE
END

FIG. 18

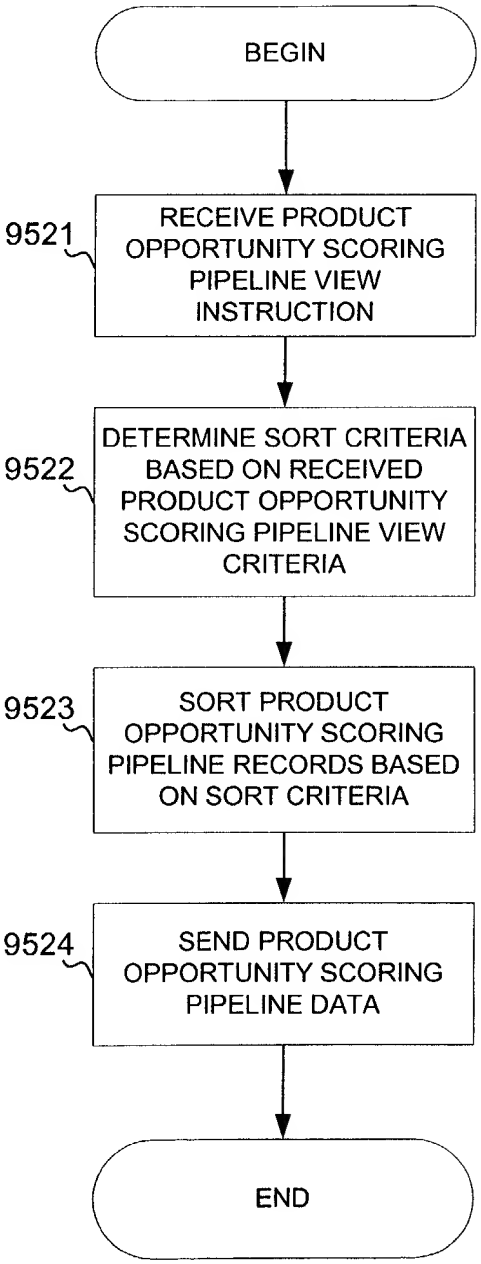
BEGIN
9521
RECEIVE PRODUCT OPPORTUNITY SCORING PIPELINE VIEW INSTRUCTION
9522
DETERMINE SORT CRITERIA BASED ON RECEIVED PRODUCT OPPORTUNITY SCORING PIPELINE VIEW CRITERIA
9523
SORT PRODUCT OPPORTUNITY SCORING PIPELINE RECORDS BASED ON SORT CRITERIA
9524
SEND PRODUCT OPPORTUNITY SCORING PIPELINE DATA
END

FIG. 19

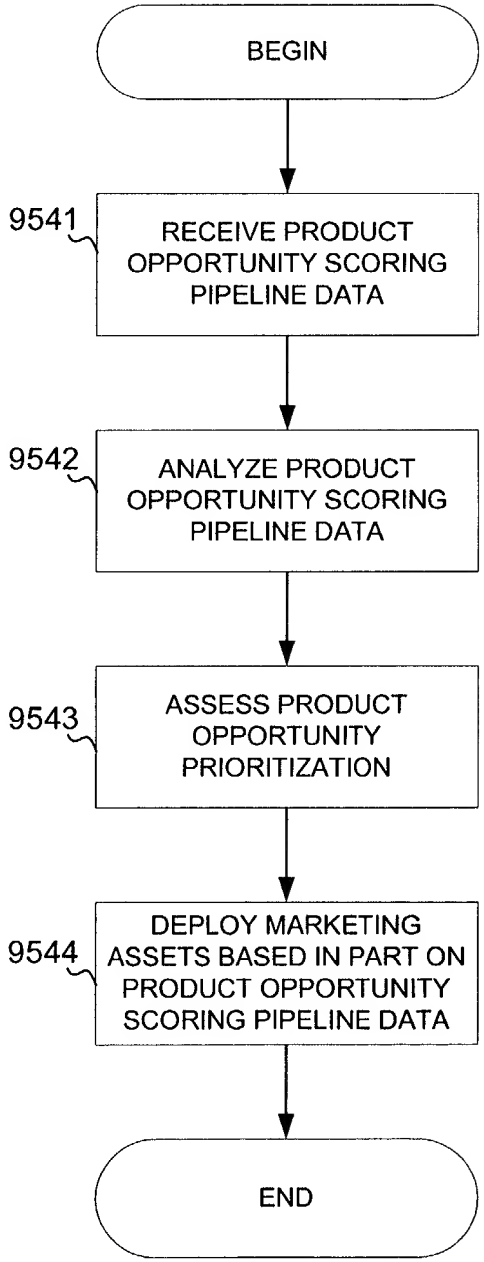
BEGIN
9541
RECEIVE PRODUCT OPPORTUNITY SCORING PIPELINE DATA
9542
ANALYZE PRODUCT OPPORTUNITY SCORING PIPELINE DATA
9543
ASSESS PRODUCT OPPORTUNITY PRIORITIZATION
9544
DEPLOY MARKETING ASSETS BASED IN PART ON PRODUCT OPPORTUNITY SCORING PIPELINE DATA
END

FIG. 20

Intellectual Property Development, Marketing and Maintenance Database System		
IP Marketing Database - Tables		
Table		**Description**
Companies		Table of companies
Marketing Opps		Table of IP marketing opportunities
IP Marketing Database - Companies Table		
Field Name	**Data Type**	**Description**
Formal Name	Text	Mailstop
IP Marketing Database - Marketing Opps Table		
Field Name	**Data Type**	**Description**
Opp #	AutoNumber	
Status	Text	
Estimated Mktg Date	Date/Time	
Product/Project Name	Text	
Product Group	Text	
Product Type	Text	
Type of IP Involved	Text	
BellSouth Entity	Text	
BellSouth Contacts	Memo	
BIPMAN Contact1	Text	
BIPMAN Contact2	Text	
BIPMAN Contact3	Text	
BIPMAN Contact4	Text	
Mktg Participant Name	Text	
Mktg Participant Address1	Text	
Mktg Participant Address2	Text	
Mktg Participant City, State,	Text	
Mktg Participant Contacts	Memo	
Mktg Participant Type	Text	
Deal Size	Text	
Estimated Deal Range	Text	
Estimated Deal Value	Text	
Priority	Text	
Description of Opportunity	Memo	
Background of Deal	Memo	
Financial Analysis	Memo	
Competitive Analysis	Memo	
Status of Deal	Memo	
Anticipated Timelines	Memo	
Pre-Trans Approval Person	Text	
Pre-Trans BellSouth Co	Text	
Title of Pre-Trans Approver	Text	
Date Pre-Trans Approved	Date/Time	
Final Bus Approval Person	Text	
Final Bus Approver's BellSouth	Text	
Title of Final Bus Approver	Text	
Date Final Bus Approved	Date/Time	
Final Legal Approval Person	Text	
Final legal Approver's BellSouth	Text	
Title of Legal Bus Approver	Text	

FIG. 21

Date Legal Bus Approved	Date/Time	
Follow-Up Date	Date/Time	
Follow-Up Needed	Memo	
Patent Status	Text	
IT Platform	Memo	
Level 1 Date	Date/Time	
Level 2 Date	Date/Time	
Level 3 Date	Date/Time	
Level 4 Date	Date/Time	
Level 5 Date	Date/Time	
Sub-entity	Text	
Top25	Yes/No	

IP Marketing Database - Queries

Queries		Description
CoAlphaSort		
Level 0 WIP Report		
Level 1 WIP Report		
Level 2 WIP Report		
Level 3 WIP Report		
Level 4 WIP Report		
Level 5 WIP Report		
Marketing Opps Query		
Most Recent New Deals		
Opportunity Summaries - Specify 1 Entity Only		
Report by Entity-Specify 1 Entity Only		
Top 25 Report		

IP Marketing Database - Forms

Forms		Description
Marketing Opps		

IP Marketing Database - Reports

Reports		Description
Deal Overview by Vendor		
Level 0 WIP Report		
Level 1 WIP Report		
Level 2 WIP Report		
Level 3 WIP Report		
Level 4 WIP Report		
Level 5 WIP Report		
Most Recent New Deals		
Opportunity Summaries - ALL		
Opportunity Summaries - Specify 1 Entity Only		
Report by Entity - All		
Report by Entity-Specify 1 Entity Only		
Sales Funnel by Status		
Sales Funnel Tracking by Date		
Top Deals Report		

FIG. 22

Contract Tracking Database - Tables		
Tables		**Description**
Agreement Types		
Companies		
Contracts Listing		

Contract Tracking Database - Agreement Types Table		
Field Name	**Data Type**	**Description**
ID	AutoNumber	
Agreement Type	Text	
Description	Memo	

Contract Tracking Database - Companies Table		
Field Name	**Data Type**	**Description**
ID	AutoNumber	
Field1	Text	Company names

Contract Tracking Database - Contracts Listing Table		
Field Name	**Data Type**	**Description**
ID	AutoNumber	
First Pary	Text	
Second Party	Text	
Third Party	Text	
Effective Date	Date/Time	
Termination or Renewal Date	Date/Time	
Termination/Renewal Terms	Memo	
Confidentiality Period?	Text	
Executed Copy on File?	Text	
Location of Original	Text	
Additional Comments	Memo	
Agreement Type	Text	
Executed Contract Image	Hyperlink	Link to scanned image of signed original agreement
Other Document Image	Hyperlink	Link to scanned image of signed original agreement
Transaction Report Image	Hyperlink	Link to scanned image of signed original agreement
Affiliate Involved	Text	
Transaction Type	Text	
Types of IP Involved	Text	
Frequency of Payment	Text	
Payment/Royalty Due Date	Date/Time	
Additional Payment Terms	Text	
Amount Due	Text	
1999 YTD Payments	Currency	
2000 YTD Payments	Currency	
2001 YTD Payments	Currency	
2002 YTD Payments	Currency	
2003 YTD Payments	Currency	
IPType 1	Text	
IPType 2	Text	
IPType 3	Text	
IPType 4	Text	
IPType 5	Text	
Project Name	Text	

Contract Tracking Database - Queries		
Queries		**Description**

FIG. 23

Company Alpha Order		
Unexecuted Agreements		
Contract Tracking Database - Forms		
Forms		**Description**
Contracts Listing		
Contract Tracking Database - Reports		
Reports		**Description**
Unexecuted Agreements		

Document 1 Page 2 of 2

FIG. 24

Innovation Awards Database - Tables		
Tables		**Description**
Awards		
Company Addresses		
ESP Coordinators		
IP Coordinators		

Innovation Awards Database - Awards Table		
Field Name	**Data Type**	**Description**
Key #	AutoNumber	Unique Key
Award #	Text	Award ID#
LegalCaseNo	Text	Legal Dept. Case No.
Greeting	Text	Mr., Ms., Dr. etc.
FullName	Text	Recipient's Full Name
CompanyName	Text	Company Name
BusAdr1	Text	Mailstop
BusAdr2	Text	Street Address
City	Text	City
State	Text	State
ZipCode	Text	Zip
Phone#	Text	Business Phone
FAX#	Text	Business FAX
IP ID#	Text	Name of IP Coordinator
SupvGreetings	Text	Mr., Ms., Dr. etc.
SupervisorName	Text	Supervisor's Name
SupvBusAdr1	Text	Supervisor's Mailstop
SupvBusAdr2	Text	Supervisor's Street Address
SupvCity	Text	Supervisor's City
CupvState	Text	Supervisor's State
SupvZipCode	Text	Supervisor's Zip
DHGreeting	Text	Mr., Ms., Dr. etc.
DeptHead	Text	Name of Department Head
DHBusAdr1	Text	Department Head Mailstop
DHBusAdr2	Text	Department Head Street Address
DGCity	Text	Department Head City
DHState	Text	Department Head State
DHZipCode	Text	Department Head Zip
Disclosure Received by Legal	Text	Date Disclosure Received by Legal
Disclosure Received by BIPMAN	Text	Date Disclosure Received by BIPMAN
Letter & Gift Sent to Inventor	Date/Time	Date Letter & Gift Sent to Inventor
Date Application Filed	Date/Time	Date Application Filed
Date BIPMAN Notified of Filing	Date/Time	Date BIPMAN Notified by Legal
Filing Award Request sent to IPC	Date/Time	Date Payment Requet Sent to IP Coordinator
Filing Awd Payment Conf Rec'd	Date/Time	Confirmation of Payment to Inventors Rec'd
Filing Award Recognized at Luncheon	Date/Time	Date Award was Recognized at Inn. Awds. Banquet
Date Application Issued	Date/Time	Date Application Issued
US Patent Number	Text	US Patent Number
Date BIPMAN Notified of Filing	Date/Time	Date BIPMAN Notified by Legal
Issuance Award Request sent to IPC	Date/Time	Date Payment Requet Sent to IP Coordinator
Iss Awd Payment Conf Rec'd	Date/Time	Confirmation of Payment to Inventors Rec'd
Iss Award Recognized at Luncheon	Date/Time	Date Award was Recognized at Inn. Awds. Banquet
Date 5th Patent Issued	Date/Time	Date Application Issued
US Patent Numbers	Text	US PATENT Numbers for 5 Issued Patents

FIG. 25

Date BIPMAN Notified of Inv Ach Awd	Date/Time	Date BIPMAN Notified by Legal
Inv Ach Award Request sent to IPC	Date/Time	Date Payment Request Sent to IP Coordinator
Inv Ach Awd Payment Conf Rec'd	Date/Time	Confirmation of Payment to Inventors Rec'd
Inv Ach Award Recongnized at Luncheon	Date/Time	Date Award was Recognized at Inn. Awds. Banquet
Date General Award Appl Rec'd	Date/Time	Date Application Filed
General Award Request sent to IPC	Date/Time	Date Payment Request Sent to IP Coordinator
General Awd Payment Conf Rec'd	Date/Time	Confirmation of Payment to Inventors Rec'd
General Award Recognized at Luncheon	Date/Time	Date Award was Recongnized at Inn. Awds. Banquet
Date Article Published	Date/Time	Date Application Filed
Date BIPMAN Notified of Publication	Date/Time	Date BIPMAN Notified by Legal
Rec'd Request for Release Form	Date/Time	Req. for Release Form Rec'd
Publication Award Request sent to IPC	Date/Time	Date Payment Reuqest Sent to IP Coordinator
Confirmation of Payment Red'd	Date/Time	Confirmation of Payment to Inventors Rec'd
Publ Award Recoongized at Luncheon	Date/Time	Date Award was Recongnized at Inn. Awds. Banquet
General Notes	Memo	Comments
Award Type	Text	Type of Award
Gift Received	Text	Gift Sent to Inventor
Disclosure Title	Memo	Title of Patent Disclosure
Application Title	Memo	Title of Patent Application
Patent Title	Memo	Title of Issued Patent
Publication Title	Memo	Title of Published Artcle
General Award Title	Memo	Reason for General Award
$ Amount of General Award	Text	$ Amount of Generlal Award
BellSouth Employee	Text	Still with BellSouth?
DHTitle	Text	Department Head's Title
BSCC ESP Disclosure	Text	Designates if disclosure was rec'd thru BSCC ESP Program
ESP Coordinator	Text	ESP Coordinator's Name

Innovation Awards Database - Company Addresses Table

Field Name	Data Type	Description
CompanyName	Text	Company Name
FormalName	Text	Mailstop
BusAdr2	Text	Street Address
City	Text	City
State	Text	State
ZipCode	Text	Zip

Innovation Awards Database - ESP Coordinators Table

Field Name	Data Type	Description
ESP Coordinators	Text	
Company	Text	
Market	Text	
Department	Text	
State/Region	Text	
Phone	Text	
Fax	Text	
Street Address 1	Text	
Street Address 2	Text	
City	Text	
State	Text	
ZipCode	Number	
Mail Code	Text	

FIG. 26

Innovation Awards Database - IP Coordinators Table		
Field Name	**Data Type**	**Description**
IP ID#	Text	IP Coordinator ID#
FullNameIPC	Text	Coordinator's Full Name
Title	Text	Mr., Ms., Dr., etc.
CompanyName	Text	Company Name
BusAdr1	Text	Mailstop
BusAdr2	Text	Street Address
City	Text	City
State	Text	State
ZipCode	Text	Zip
Phone#	Text	Business Phone
FAX#	Text	Business FAX

Innovation Awards Database - Queries		
Queries		**Description**
Awards Query		
By Date & IPC - Apps Filed		
By Date & IPC - Disclosures Filed		
By Date & IPC - Patents Granted		
By Date & IPC - Apps Filed		
Certificates for Publication Awards		
Certificates for Recipients of Filing Awards		
Certificates for Recipients of Issuance Awards		
Company Order		
DH Mailing Labels - Filing Awards		
DH Mailing Labels - Inv Ach Awards		
DH Mailing Labels - Issuance Awards		
DH Mailing Labels - Publication Awards		
DH of Recipients of Filing Awards		
DH of Recipients of Inventor Ach Awards		
DH of Recipients of Issuance Awards		
DH of Recipients of Publication Awards		
Disclosure Award Letter		
Disclosure Award Letter Query		
Disclosure Gift Check		
General Award		
Inventor Achievement Award		
Inventor Mailing Labels - Filing Awards		
Inventor Mailing Labels - Inv Ach Awards		
Inventor Mailing Labels - Issuance Awards		
Inventor Mailing Labels - Publication Awards		
Issuance Award Winner Check		
Open Filing Awards		
Open General Awards		
Open Inventor Achievement Awards		
Open Issuance Awards		
Open Publications Awards		
Patent Filing Award		
Patent Issuance Award		
Progress Report		
Publications Award		
Recipients of Filing Awards		

FIG. 27

Recipients of Inventor Achievement Awards		
Recipients of Issuance Awards		
Recipients of Publication		

Innovation Awards Database - Forms		
Forms		**Description**
Awards		
Company Addresses		
ESP Coordinators		
IP Coordinators		

Innovation Awards Database - Reports		
Forms		**Description**
Awards		
By Date and IPC - Apps Filed		
By Date and IPC - Disclosures Filed		
By Date and IPC - Patents Granted		
Copy of Recipients of Issuance Awards - Report for Award Mfg		
DH of Recipients of Filing Awards		
DH of Recipients of Inventor Ach Awards		
DH of Recipients of Issuance Awards		
DH of Recipients of Publications Awards		
Disclosure Award letter		
General Award Form		
Inventor Achievement Award Form - 10 issued		
Inventor Achievement Award Form - 5 issued		
Open Filing Awards		
Open General Awards		
Open Inventor Achievement Awards		
Open Issuance Awards		
Open Publication Awards		
Patent Filing Award Form		
Patent Issuance Award Form		
Progress Report		
Publications Award Form		
Recipients of Filing Awards - Sort by Award #		
Recipients of Filing Awards - Sort by Inventor Name		
Recipients of Inventor Achievement Awards - Sort by Award #		
Recipients of Issuance Awards - Sort by Award #		
Recipients of Issuance Awards - Sort by Inventor Name		
Recipients of Publication Awards - Sort by Award #		
Recipients of Publication Awards - Sort by Inventor Name		
Verification Table		

FIG. 28

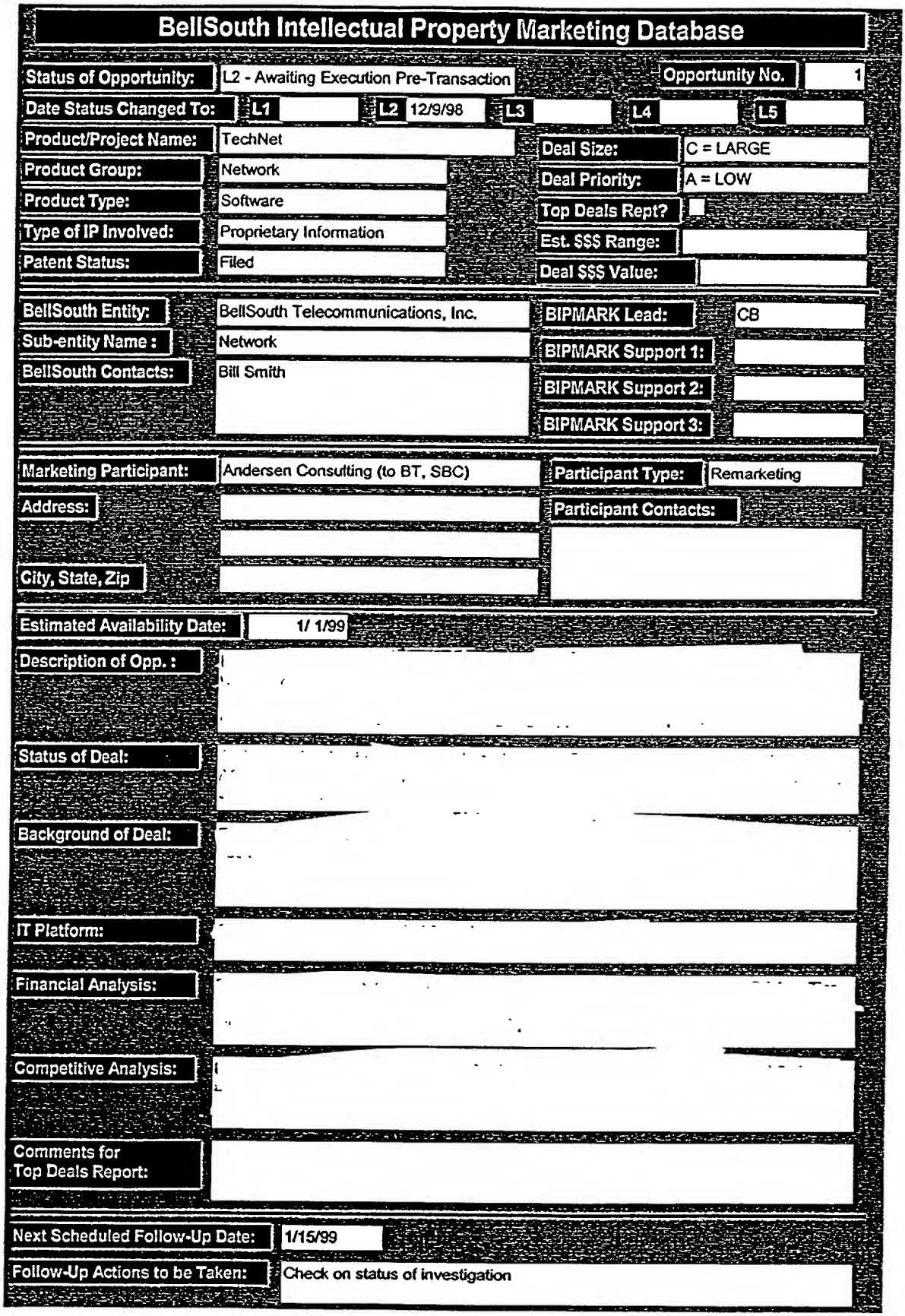
BellSouth Intellectual Property Marketing Database
Status of Opportunity:
L2 - Awaiting Execution Pre-Transaction
Opportunity No.
1
Date Status Changed To:
L1
L2
12/9/98
L3
L4
L5
Product/Project Name:
TechNet
Deal Size:
C = LARGE
Product Group:
Network
Deal Priority:
A = LOW
Product Type:
Software
Top Deals Rept?
Type of IP Involved:
Proprietary Information
Est. $$$ Range:
Patent Status:
Filed
Deal $$$ Value:
BellSouth Entity:
BellSouth Telecommunications, Inc.
BIPMARK Lead:
CB
Sub-entity Name :
Network
BIPMARK Support 1:
BellSouth Contacts:
Bill Smith
BIPMARK Support 2:
BIPMARK Support 3:
Marketing Participant:
Andersen Consulting (to BT, SBC)
Participant Type:
Remarketing
Address:
Participant Contacts:
City, State, Zip
Estimated Availability Date:
1/ 1/99
Description of Opp. :
Status of Deal:
Background of Deal:
IT Platform:
Financial Analysis:
Competitive Analysis:
Comments for Top Deals Report:
Next Scheduled Follow-Up Date:
1/15/99
Follow-Up Actions to be Taken:
Check on status of investigation

FIG. 29

Deals/Potential Opportunities
Prioritization of Top Deals

Status	Product/Project Name	Opp #	BellSouth Entity	Patent Status	Company Name	Lead	Support	Est. Value	Deal Size	Priority	Reason/Comments

[L0=Potential Opportunity] [L1=Initial Research in Progress] [L2=Awaiting Exec. Pre-Transaction Report] [L3=Negotiations in Progress] [L4=Awaiting Exec. Agrmt/Transaction Report] [L5=Contract Completed/Closed]

Tuesday, December 14, 1999

FIG. 30

PRIVATE/PROPRIETARY
Contains private/proprietary information. May not be used or disclosed outside the BellSouth companies except pursuant to a written agreement.

BellSouth Intellectual Property Marketing Corporation
Level 1 (Initial Research in Progress) WIP Report

Date Generated: Tuesday, December 14, 1999

Product/Project Name	Subsidiary Name	Opp #	Patent Status	Company Name	BIPMARK Lead	BIPMARK Support	Est. Value	Deal Size	Priority	Date Chgd to L1

FIG. 31

PRIVATE/PROPRIETARY
Contains private/proprietary information. May not be used or disclosed outside the BellSouth companies except pursuant to a written agreement.

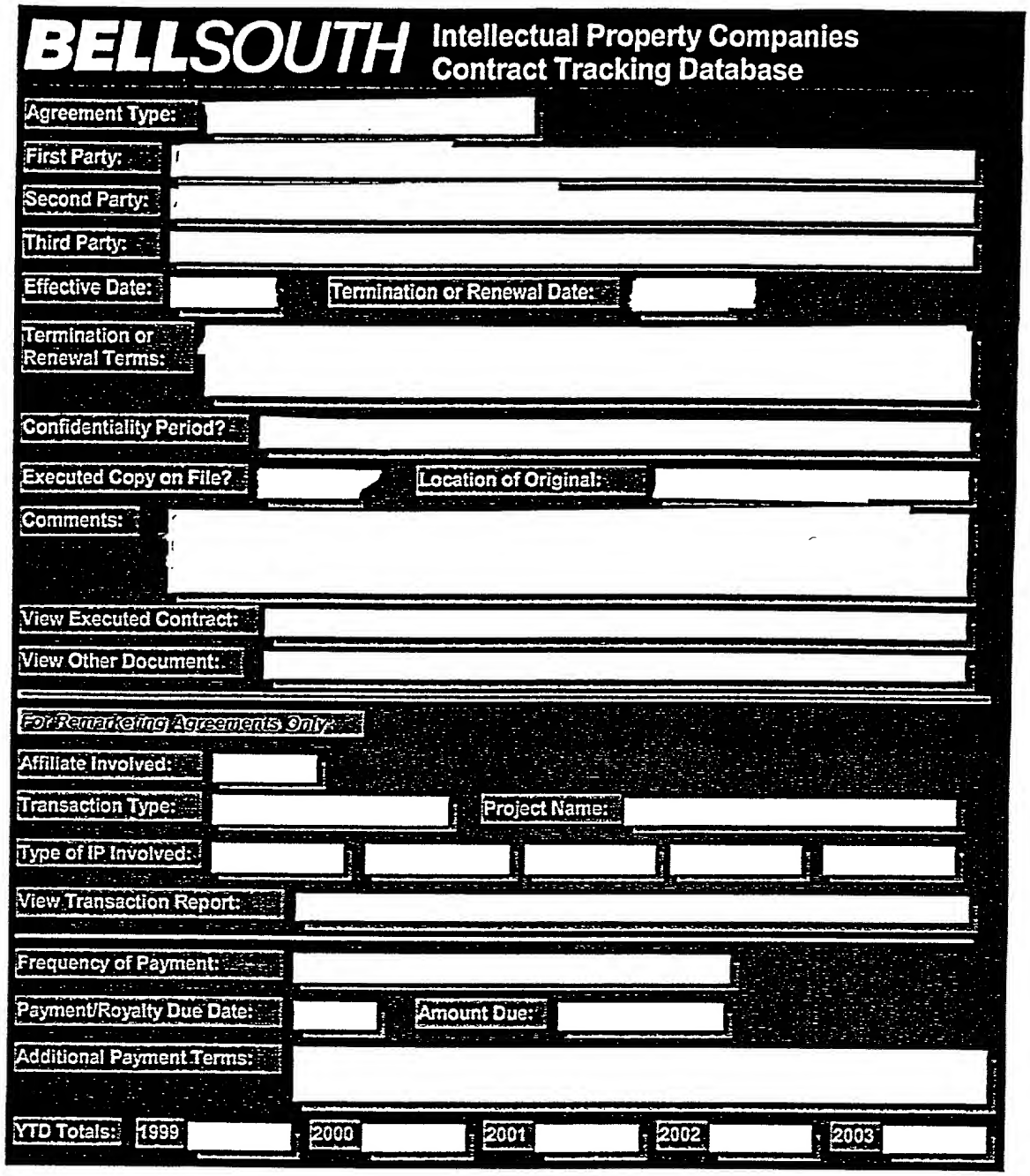
BELLSOUTH
Intellectual Property Companies
Contract Tracking Database
Agreement Type:
First Party:
Second Party:
Third Party:
Effective Date:
Termination or Renewal Date:
Termination or Renewal Terms:
Confidentiality Period?
Executed Copy on File?
Location of Original:
Comments:
View Executed Contract:
View Other Document:
For Remarketing Agreements Only:
Affiliate Involved:
Transaction Type:
Project Name:
Type of IP Involved:
View Transaction Report:
Frequency of Payment:
Payment/Royalty Due Date:
Amount Due:
Additional Payment Terms:
YTD Totals:
1999
2000
2001
2002
2003

FIG. 32

Unexecuted Agreements

Agreement Type	*First Party*	*Second Party*

FIG. 33

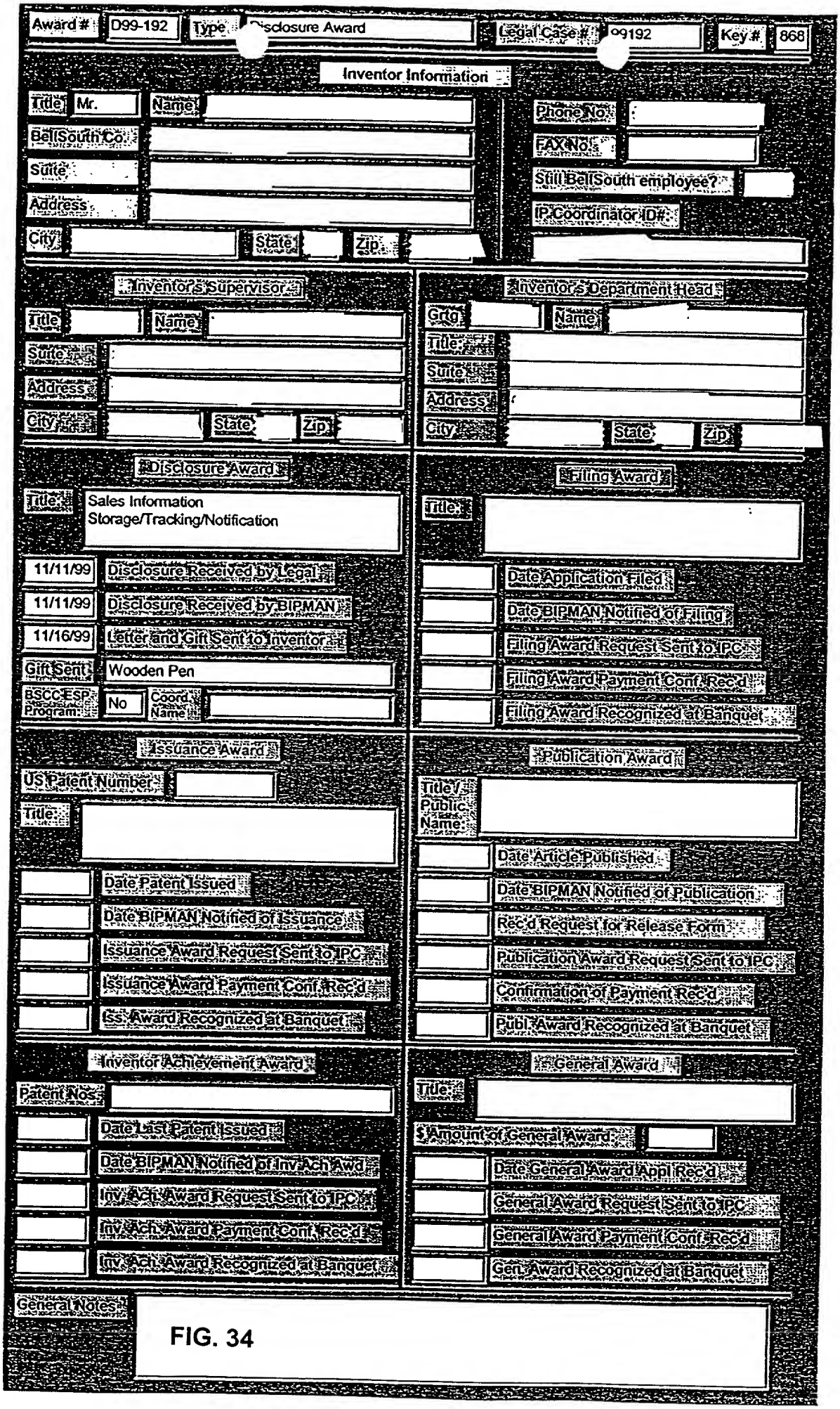
Award # D99-192
Type Disclosure Award
Legal Case # 99192
Key # 868
Inventor Information
Title Mr.
Name
BellSouth Co.
Suite
Address
City
State
Zip
Phone No.
FAX No.
Still BellSouth employee?
IP Coordinator ID#:
Inventor's Supervisor
Title
Name
Suite
Address
City
State
Zip
Inventor's Department Head
Grtg
Name
Title:
Suite
Address
City
State
Zip
Disclosure Award
Title: Sales Information Storage/Tracking/Notification
11/11/99 Disclosure Received by Legal
11/11/99 Disclosure Received by BIPMAN
11/16/99 Letter and Gift Sent to Inventor
Gift Sent: Wooden Pen
BSCC ESP Program: No
Coord Name
Filing Award
Title:
Date Application Filed
Date BIPMAN Notified of Filing
Filing Award Request Sent to IPC
Filing Award Payment Conf. Rec'd
Filing Award Recognized at Banquet
Issuance Award
US Patent Number
Title:
Date Patent Issued
Date BIPMAN Notified of Issuance
Issuance Award Request Sent to IPC
Issuance Award Payment Conf. Rec'd
Iss. Award Recognized at Banquet
Publication Award
Title / Public Name:
Date Article Published
Date BIPMAN Notified of Publication
Rec'd Request for Release Form
Publication Award Request Sent to IPC
Confirmation of Payment Rec'd
Publ. Award Recognized at Banquet
Inventor Achievement Award
Patent Nos.
Date Last Patent Issued
Date BIPMAN Notified of Inv. Ach Awd
Inv. Ach. Award Request Sent to IPC
Inv. Ach. Award Payment Conf. Rec'd
Inv. Ach. Award Recognized at Banquet
General Award
Title:
$ Amount of General Award:
Date General Award Appl Rec'd
General Award Request Sent to IPC
General Award Payment Conf. Rec'd
Gen. Award Recognized at Banquet
General Notes:

FIG. 34

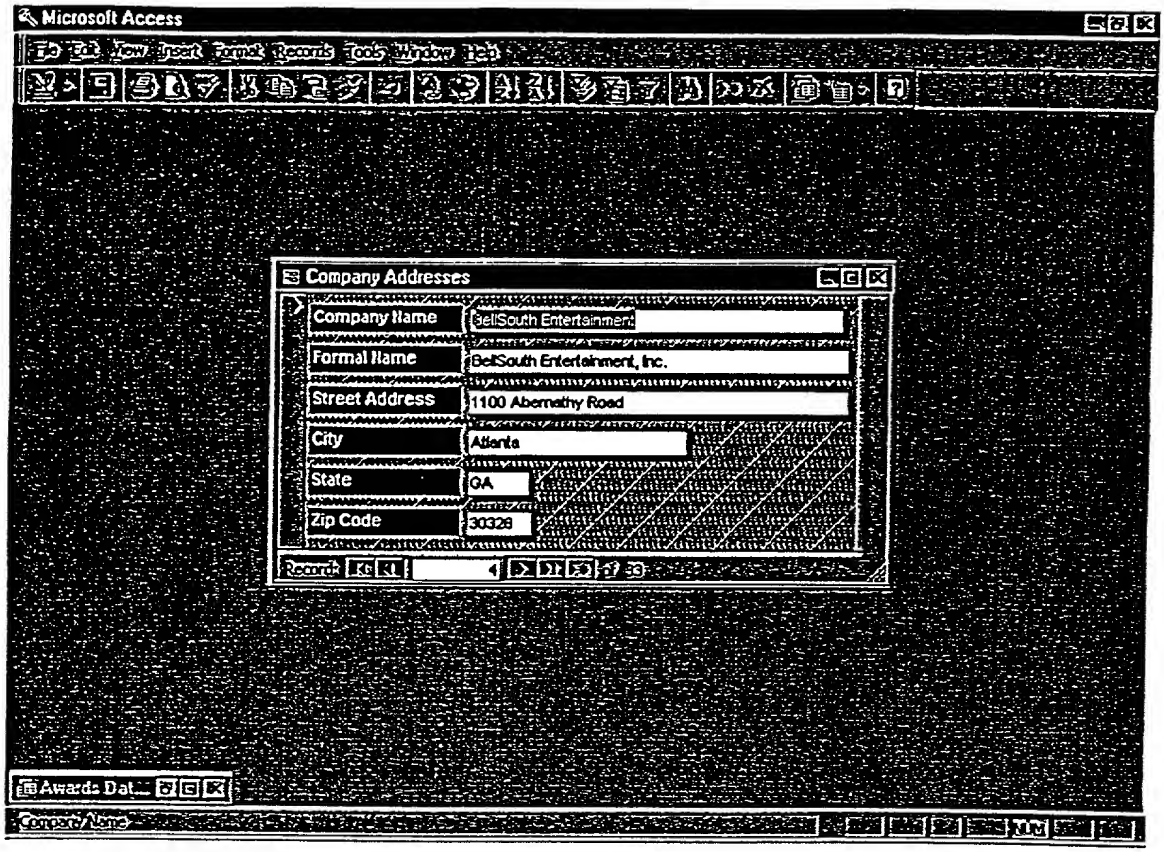
Microsoft Access
Company Addresses
Company Name
BellSouth Entertainment
Formal Name
BellSouth Entertainment, Inc.
Street Address
1100 Abernathy Road
City
Atlanta
State
GA
Zip Code
30328
Record:

FIG. 35

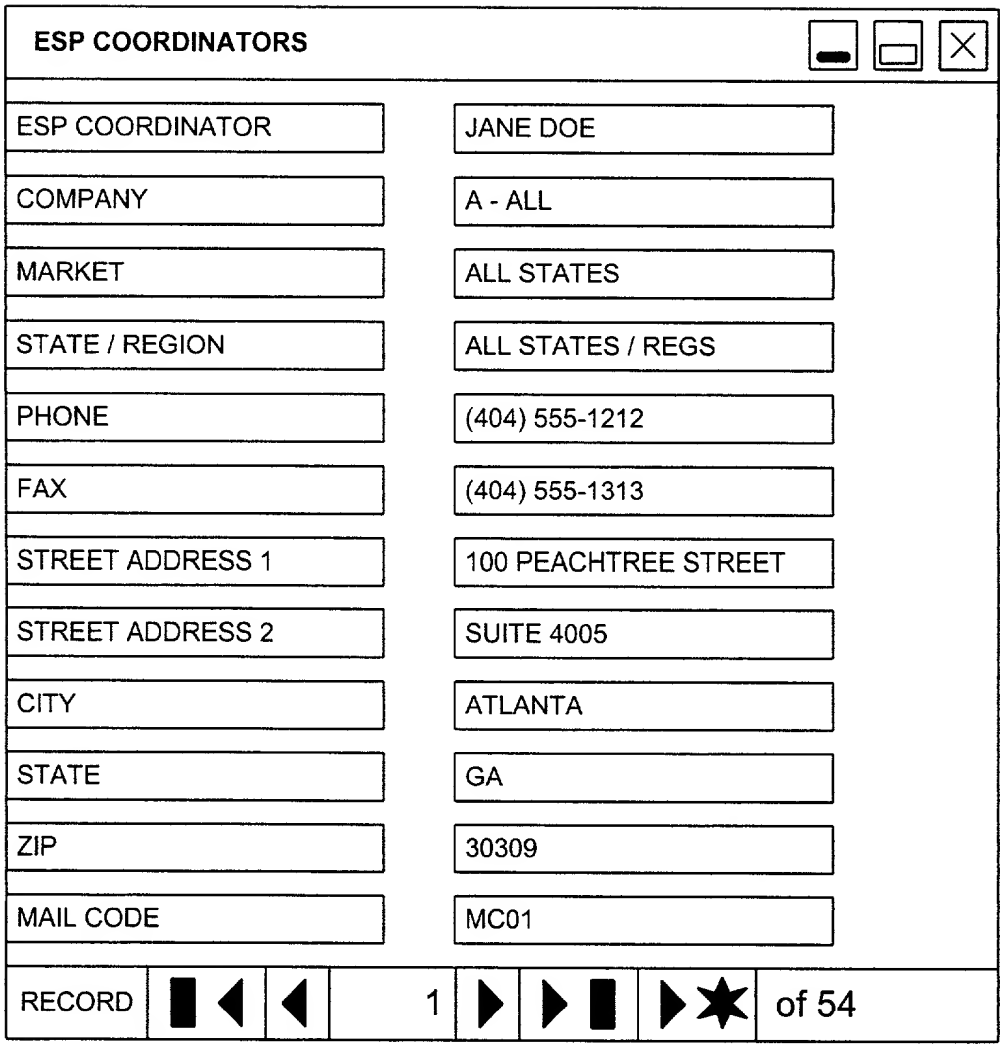
ESP COORDINATORS
ESP COORDINATOR
JANE DOE
COMPANY
A - ALL
MARKET
ALL STATES
STATE / REGION
ALL STATES / REGS
PHONE
(404) 555-1212
FAX
(404) 555-1313
STREET ADDRESS 1
100 PEACHTREE STREET
STREET ADDRESS 2
SUITE 4005
CITY
ATLANTA
STATE
GA
ZIP
30309
MAIL CODE
MC01
RECORD
1
of 54

FIG. 36

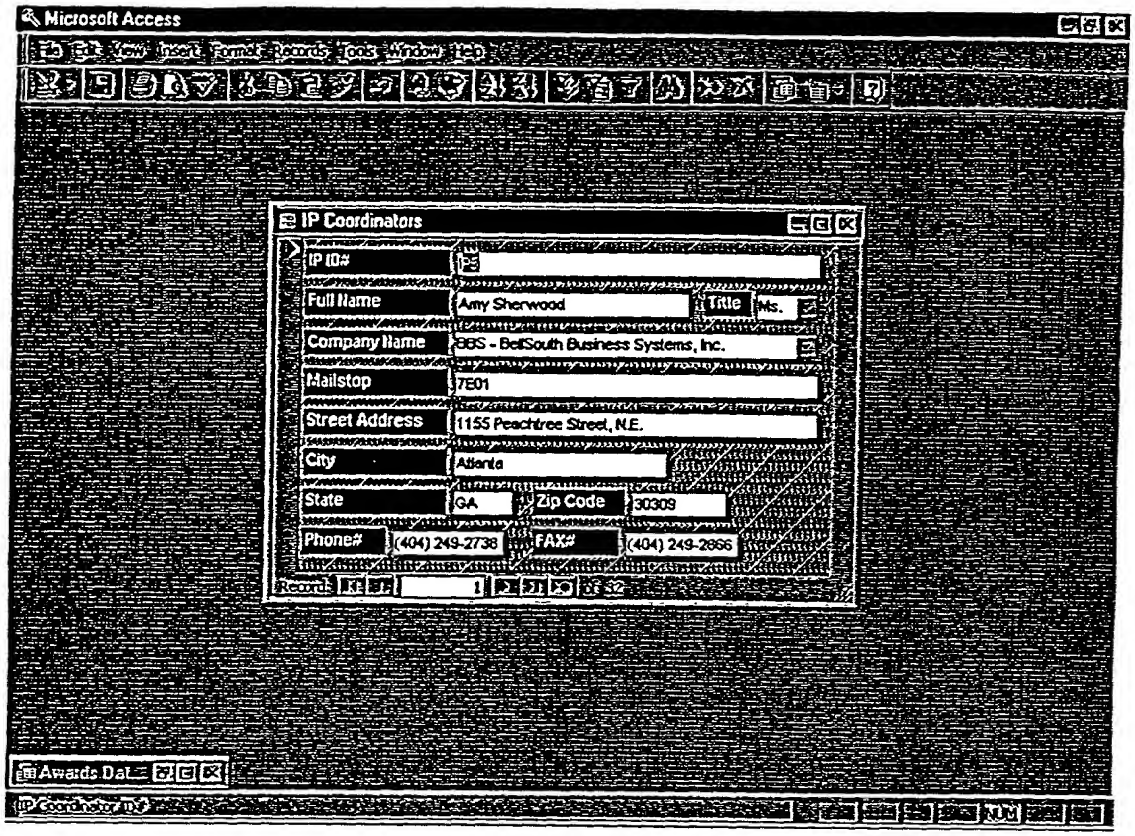
Microsoft Access
File Edit View Insert Format Records Tools Window Help
IP Coordinators
IP ID#
Full Name
Amy Sherwood
Title
Ms.
Company Name
BBS - BellSouth Business Systems, Inc.
Mailstop
7E01
Street Address
1155 Peachtree Street, N.E.
City
Atlanta
State
GA
Zip Code
30309
Phone#
(404) 249-2738
FAX#
(404) 249-2666
Record: 1 of 32
Awards Dat

FIG. 37

Innovation Award Request
Patent Filing Award

Date of Request	BellSouth File No.	Innovation Award No.
December 8, 1999	98059	A99-075

Date Application Filed:

Title of Application:

Please arrange payment of a Specific Innovation Award for filing of a patent application for the inventor listed below. Innovation Awards should be grossed up for federal and state taxes. Due to the significance of this contribution to BellSouth, the award should be presented in an appropriate ceremony in the presence of the inventor's peers and/or higher management.

Award Amount:

Approved By: ___X___ *IP Legal*
_____ *BellSouth IP Management Corp.*

Inventor Name	Inventor Signature
Supervisor Name	Supervisor Signature
IP Coordinator Name	IP Coordinator Signature

Certification of payment and this signed request form must be returned to:

Julia Spires, Intellectual Property Administrator
1155 Peachtree Street, NE - Suite 500 - Atlanta, GA 30309
(404) 249-2961

PRIVATE/PROPRIETARY/LOCK

Contains Private and/or Proprietary Information. May not be used or disclosed outside the BellSouth Companies except pursuant to a written agreement. Must be stored in locked files when not in use.

FIG. 38

MEMORANDUM

To: John E. Lewis

From: Marcus Delgado

Date: December 8, 1999

RE: Notification of Patent Application Filing for
Title:
BellSouth No.:
Filing Date:

The above-referenced patent application was filed in the U.S. Patent and Trademark Office ("PTO") on the filing date shown above. We expect the official filing receipt, including the assigned serial number for this application, within the next several weeks.

We will keep you advised of further progress as the application proceeds through the PTO.

cc: Donna Post

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FIG. 39

Patents Granted 9/1/99 Through 11/30/99

Award	*Legal No.*	*Inventor Name*	*CompanyName*	*Patent Title*	*US Patent No.*	*Date Issued*
A99-067	96013	JoAnn Blount (retired)	BSCC - BellSouth Cellular Corp.	Method and System for Automatically Connecting Telephone Calls to Multiple Devices Having Different Directory Numbers (as amended)	5,963,864	10/ 5/99

FIG. 40

Intellectual Property Management Database System

Marketing Table

Field Name	Data Type	Description	Relates (KEY)	Location of Data	Editable	Security	Comments
Project Number	Number	Unique number to keep track of each project	PK	System generated	Non-Editable		
Project Name	Character	Name of the project		Free Form Entry	Editable		
Status of Project	Character	Status of the project		Lookup Table	Editable		
Status Date	Date	Anticipated dates for different status levels		Can be system generated and/or free form.	Editable		A version can update when changing status levels.
Customer		Pulls additional information into database, Name, Contact, Phone - from People/Address table		Lookup Table	Editable		
		Customer Name					
		Contact					
		Phone					
		Party to final contract?					
Remarketing Partner		Pulls additional information into database, Name, Contact, Phone, party to final contract - from People/Address table		Lookup Table	Editable		
		Company Name					
		Contact					
		Phone					
		Party to final contract?					
IP Group Personnel		Pulls additional information into database, Name, Role, party to final contract - from People/Address table		Lookup Table	Editable		
		Name					
		Role					
Products	Character	Pointer back to product table		Lookup Table	Editable		
		Product Name					
Deal Size	Character	Drop Down Estimate, small, medium and large		Lookup Table	Editable		
Deal Value	Number	Actual deal value entered after the deal is closed		Free Form	Editable		
Deal Priority	Character	low, medium, high		Lookup Table	Editable		
Include in Top Deals Report	Y/N (or CHAR)	Check box designating as important deal		Free Form	Editable		
Description of Project	Character			Freeform	Editable		
Followup Date	DATE	Next Scheduled Followup Date		Freeform	Editable		
Followup Actions	Character	Follow-up Actions to be Taken		Freeform	Editable		
Responsible Party	Character	Responsible Party for Follow-up - Looks at People/Address Table - Potentially allow multiple values		Lookup Table	Editable		

FIG. 41

Files	Character	pointer back to files and file comments		Freeform	Editable		
		File					
		Comments					
Associated Contract		Pointer that pulls information from contract table - including name		Lookup Table	Editable		
		Name					
		Agreement Type					

Contract Tracking Table

Field Name	Data Type	Description	Relates (KEY)	Location Data	Editable	Security	Comments
Agreement Number	Number		KEY	System Generated	Non-Editable		
Agreement Name	Character			Freeform	Editable		
Agreement Type	Character			Lookup Table	Editable		
Project Number	Number	Key field for linking to marketing opportunities	Potentially a Foreign Key	Potentially a Foreign Key	Non-Editable		
Parties	Character	Lookup to People/Address table		Lookup Table	Editable		Should be able to add to the list
		Company Name					
		Type					
		Contact					
Effective Date	DATE			Freeform	Editable		
Termination/Renewal Date	DATE			Freeform	Editable		
Termination/Renewal Terms	Character			Freeform	Editable		
List IP	Character	List of IP Involved; pop-up box to add IP pointers, IP Type, Name, Ref #	Potentially a Foreign Key	Potentially a Foreign Key	Non-Editable		User can modify which IP is licensed
		IP Type					
		Name					
		Ref. #					
Exclusivity	Character	values: exclusive, non-exclusive		Lookup Table	Editable		
Form of Agreement	Character	values: Distribution License, Straight Use License, Strategic Agreement		Lookup Table	Editable		
Description	Character			Freeform	Editable		
Type of Revenue	Character	values: cash, savings, cash & savings		Lookup Table	Editable		
Unique T&C	Character			Freeform	Editable		
Frequency of Payment	Character			Lookup Table	Editable		
Reason for Termination	Character			Freeform	Editable		
Type of License	Character	Do we still want this?...not on screen shots		Lookup Table			
Confidentiality Period	DATE			Freeform	Editable		This can be a range or a final date.

FIG. 42

File	Character	Pointer to attached files and comments		Freeform	Editable		
		File Name					
		Comments					
Product	Character						
BellSouth Business Unit	Character	Pointer to BellSouth Business Unit and Royalty Percentage		Lookup Table	Editable		
		BellSouth Business Unit					
		Royalty Percentage					
Notice Date	Date						
Customers Party to Contract	Character						
Parties to Contract	Character						
Underlying Ip of Product	Character						
Action	Character	Button (field) that points to information in the action table		Lookup Table			
		Expected Due Date					
		Actual Date					
		Action Type (Lookup)					
		Expected Amount					
		Actual Amount					
		Expected Action					
		Actual Action					
		Internal Contact					
		External Contact					
		Comments					
Comments	Character			Freeform			

IP TABLE (Trade Secrets or Copyrights)

Field Name	Data Type	Description	Relates (KEY)	Location Data	Editable	Security	Comments
IP #	Number	System Generated	Primary Key	Primary Key	Non-Editable		
IP Type	Character	TS or Copyright or Both		Lookup Table	Editable		
IP Name	Character			Freeform	Editable		
BellSouth Sub-entity	Character			Freeform	Editable		
BellSouth Business Unit	Character			Lookup Table	Editable		Could also be freeform
IP Description	Character	Freeform comments		Freeform	Editable		
Associated Files Attached	Character	Pointer to electronic file and comments		Freeform	Editable		
		File Name					
		Comments					
Copyright Filed?	Character	Build Lookup N/A, Yes or No.		Lookup Table	Editable		

FIG. 43

Product Table							
Field Name	Data Type	Description	Relates (KEY)	Location Data	Editable	Security	Comments
Product Description	Character	Product Description		Freeform	Editable		
Product Number	Number	System Generated	Primary Key	Primary Key	Non-editable		System Generated
BellSouth Sub-entity	Character			Freeform	Lookup Table		
BellSouth Business Unit	Character	Allow multiple values		Lookup Table	Editable		Could also be freeform
BellSouth Contacts	Character	Pointer to People/Address Table, Name, Phone and Position (e.g., role)		Freeform	Editable		
		Name					
		Phone #					
		Position					
List of Patents	Character	Pointer to CPI Patent Database Records		CPI System	Editable		
		Status					
		Docket #					
		Country					
		App. #					
		Filing Date					
		Patent #					
		Issue Date					
		Inventor					
		Title					
		Comments - Not sure if in CPI					
List of TM	Character	Pointer to CPI TM Database Records		CPI System	Editable		
		Status					
		Mark					
		Country					
		App. #					
		Docket #					
		Filing Date					
		Reg. #					
		Reg. Date					
		Renewal Date					
		Comments - Not sure if in CPI					
List of Trade Secrets & Copyrights	Character	Pointer to IP Table		Lookup Table	Editable		
		Name					
		Description					
		BellSouth Sub-entity					
		BellSouth Business Unit					
		IP #					

FIG. 44

Date Available for Sale	DATE			Freeform	Editable		
Technical Requirements	Character			Freeform	Editable		
Product Name	Character	allow multiple values		Freeform	Editable		
Files	Character	pointer to files and comments		Lookup Table	Editable		
		File Name					
		Comments					

Patents Table (CPI)-Used in IP Table

Field Name	Data Type	Description	Relates (KEY)	Location Data	Editable	Security	Comments
Patent #							
Issue Date							
Inventor							
Status							
Docket #							
Title							
Country							
App #							
Filing Date							
Comments		This may not be in CPI					

Trademark Table (CPI) Used in IP Table

Field Name	Data Type	Description	Relates (KEY)	Location Data	Editable	Security	Comments
Mark							
Reg. #							
Registration Date							
Status							
App #							
Docket #							
Country							
Filing Date							
Renewal Date							
Comments		This may not be in CPI					

Corp/Org. Table

Field Name	Data Type	Description	Relates (KEY)	Location Data	Editable	Security	Comments
Name							
Type		IP Group, Remarking, Customer, Alliance					

FIG. 45

People/Address Table							
Field Name	Data Type	Description	Relates (KEY)	Location Data	Editable	Security	Comments
Org							
Name							
Phone							
Address							
Comments							
Position							
Roles Lookup Values							
Contact							
Research							
Other							
Contact Lookup Values							
IP Group Personnel							
End Users/Customers							
BellSouth Business Unit							
Status Lookup Values		Used in Marketing Module					
Conduct Initial Research							
Conduct Market Research and Analysis							
Develop marketing plan & package							
Sell product							
Negotiate contract							
Complete & approve transaction report							
Execute contract							
Set up maintenance plan							
Close out project							
BellSouth Business Units Lookup Values		Used in IP Inventory Module, Product Inventory Module					
BASC (Affiliate Service Corp.)							
BBI (Billing Inc.)							
BBS (Business Systems)							
BPC (Public Communications)							
BSC (Corporate)							
BSCC (Cellular)							
BSE (Entertainment)							
BSI (International)							
BSNET (.Net)							
BST (Telecommunications)							

FIG. 46

BAPCO (Advertising and Publishing)							
BAT (Applied Technology)							
BCS (Communication Systems)							
BWD (Wireless Data)							
Agreement Type Lookup Values		Used in Contract Module					
Administrative Services Agreement							
Master Licensing Agreement							
Sublicensing Agreement							
Services Agreement							
Sublease Agreement							
Consulting Agreements							
Recruiter Agreements							
Remarketing Agreements							
Freq. of Payments Lookup Values		Used in Contract Module					
One-time Development/Maintenance Savings							
One Time Up-Front License Fee							
One Time Up-Front License Fee w/ Future Royalties Due							
Monthly Report/Royalty Payment							
Quarterly Report/Royalty Payment							
Annual Report/Royalty Payment							

FIG. 47

ACTION TABLE							
Field Name	**Data Type**	**Description**	**Relates (KEY)**	**Location Data**	**Editable**	**Security**	**Comments**
Action Due Date	Date			Freeform			
Action Type	Character			Freeform			
Expected Amount	Number			Freeform			
Expected Action	Character			Freeform			
BellSouth Sub-entity	Character			Freeform			This can be business unit.
Royalty Expected Due Date	Date			Freeform			
Royalty Actual Date	Date			Freeform			
Royalty Action Type	Character			Lookup Table			
Royalty Expected Amount	Number			Freeform			
Royalty Actual Amount	Number			Freeform			
Royalty Expected Action	Character			Freeform			
Royalty Actual Action	Character			Freeform			
Royalty Internal Contact	Character			Lookup Table			
Royalty External Contact	Character			Lookup Table			
Royalty Comments	Character			Freeform			
Start Date	Date			Freeform			
End Date	Date			Freeform			
Period	Character			Lookup			

FIG. 48

Contacts TABLE							
Field Name	**Data Type**	**Description**	**Relates (KEY)**	**Location Data**	**Editable**	**Security**	**Comments**
Company Name				Freeform			
BellSouth Sub-entity				Freeform			
Type		IP Group, Remarketing, Customer, Alliance, Bellsouth Internal					
Events		Pointer to Events table		Freeform			
		Date					
		Comments					
		Attached Files					
Contacts							
		Name					
		Title					
		Country					
		Address1					
		Address2					
		City					
		State					
		Zip					
		Phone					
Individual Contact Events		Pointer to Individual Contact Events Table					
		Date					
		Comments					
		Attached Files					

FIG. 49

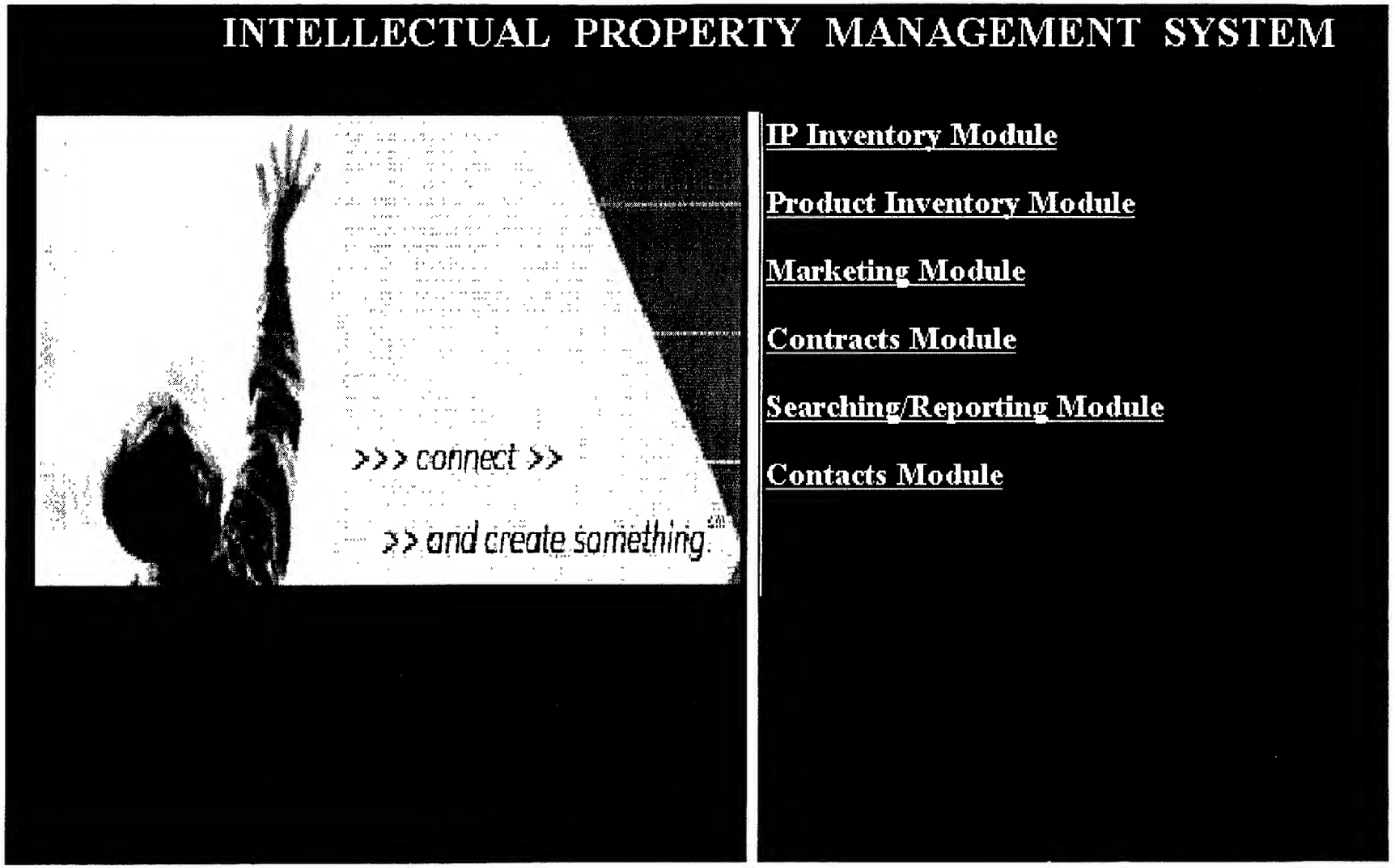

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
>>> connect >>
>> and create something.
IP Inventory Module
Product Inventory Module
Marketing Module
Contracts Module
Searching/Reporting Module
Contacts Module

FIG. 50

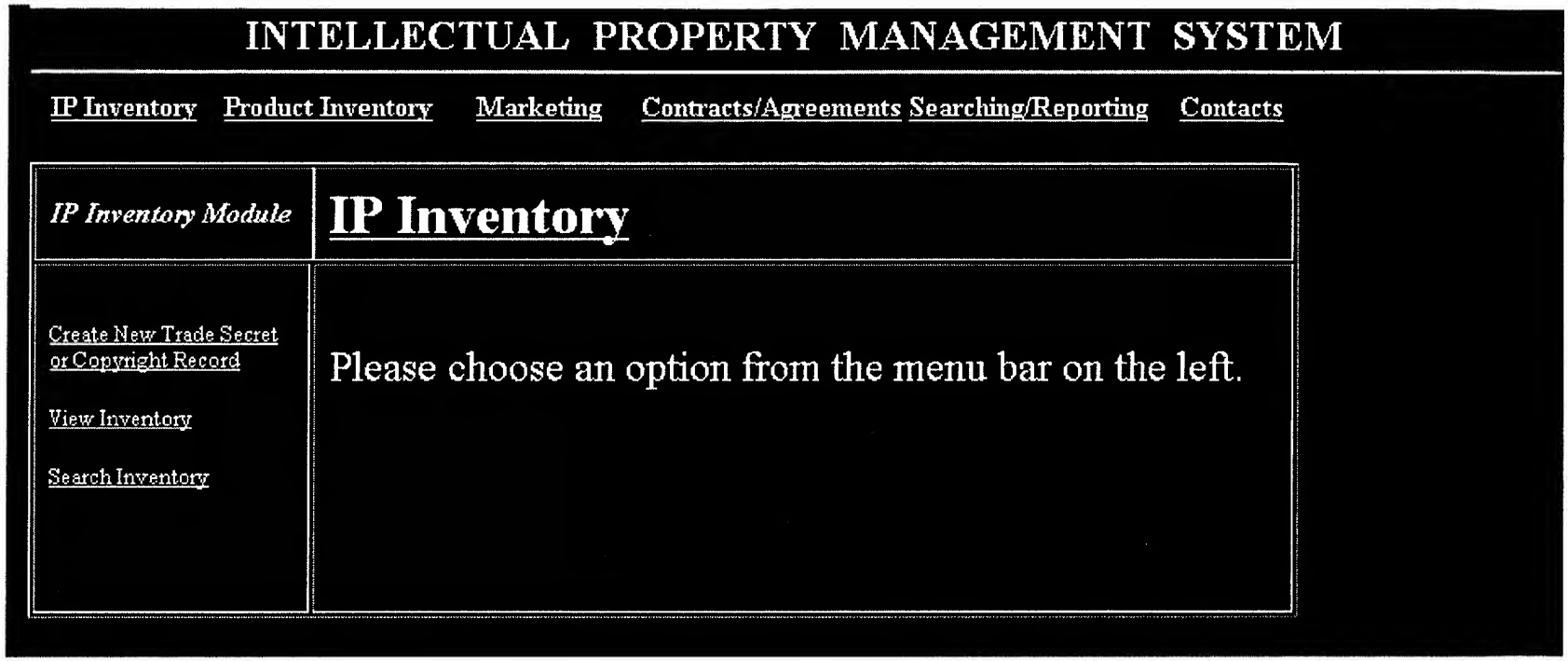

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
IP Inventory Module
IP Inventory
Create New Trade Secret or Copyright Record
View Inventory
Search Inventory
Please choose an option from the menu bar on the left.

FIG. 51

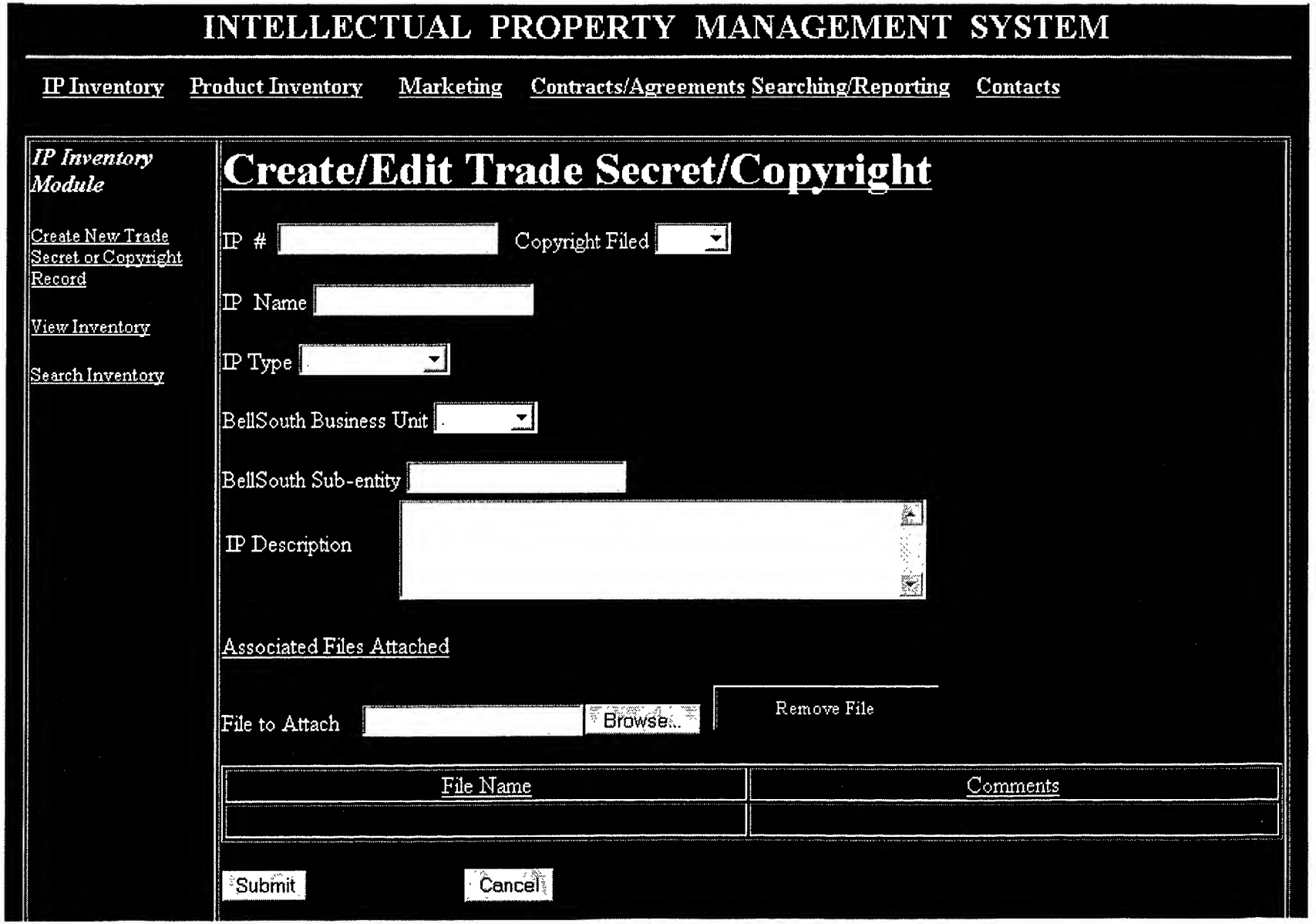

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
IP Inventory Module
Create New Trade Secret or Copyright Record
View Inventory
Search Inventory
Create/Edit Trade Secret/Copyright
IP #
Copyright Filed
IP Name
IP Type
BellSouth Business Unit
BellSouth Sub-entity
IP Description
Associated Files Attached
File to Attach
Browse...
Remove File
File Name
Comments
Submit
Cancel

FIG. 52

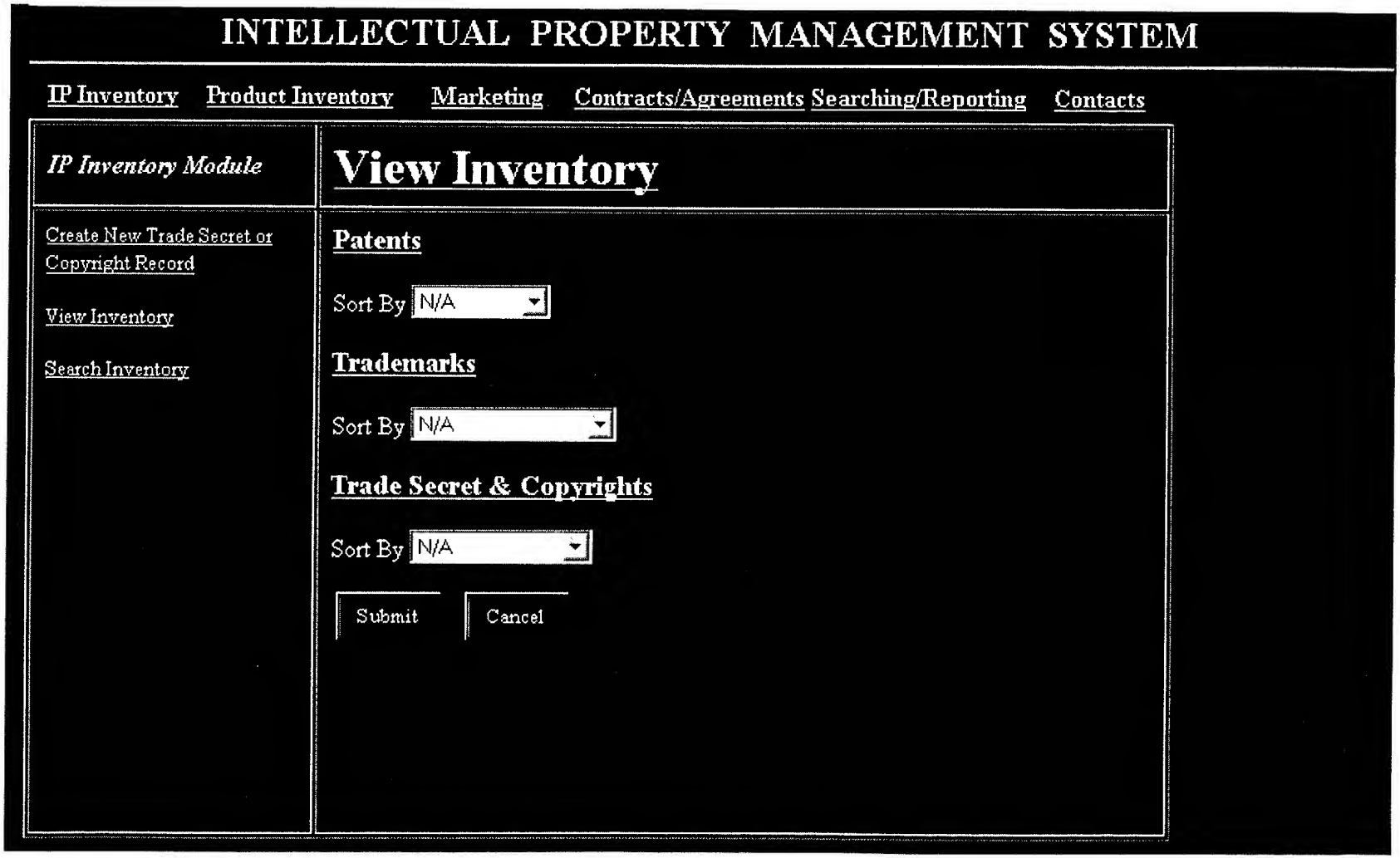

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
IP Inventory Module
View Inventory
Create New Trade Secret or Copyright Record
View Inventory
Search Inventory
Patents
Sort By N/A
Trademarks
Sort By N/A
Trade Secret & Copyrights
Sort By N/A
Submit
Cancel

FIG. 53

PROSKAUER ROSE LLP

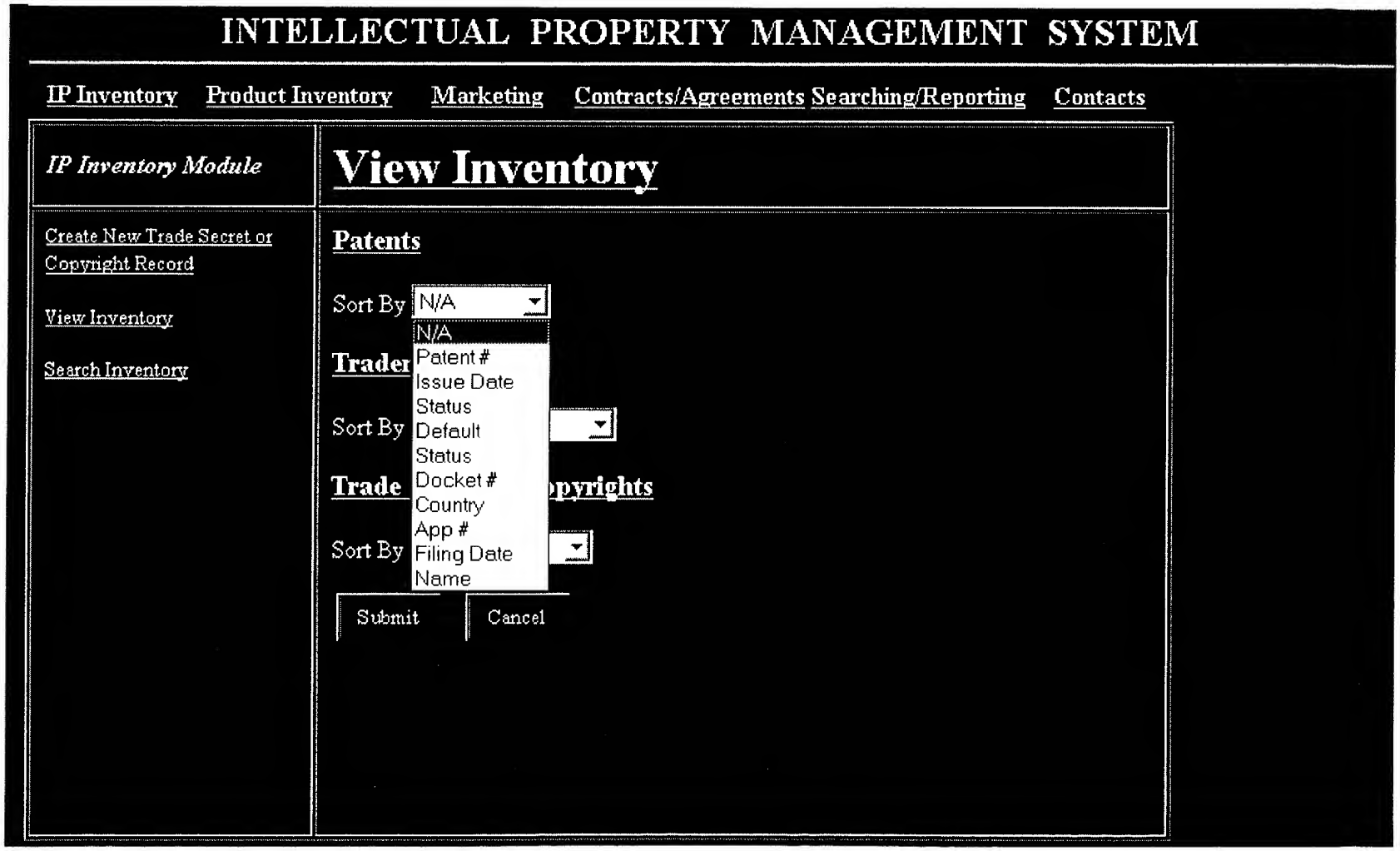


FIG. 54

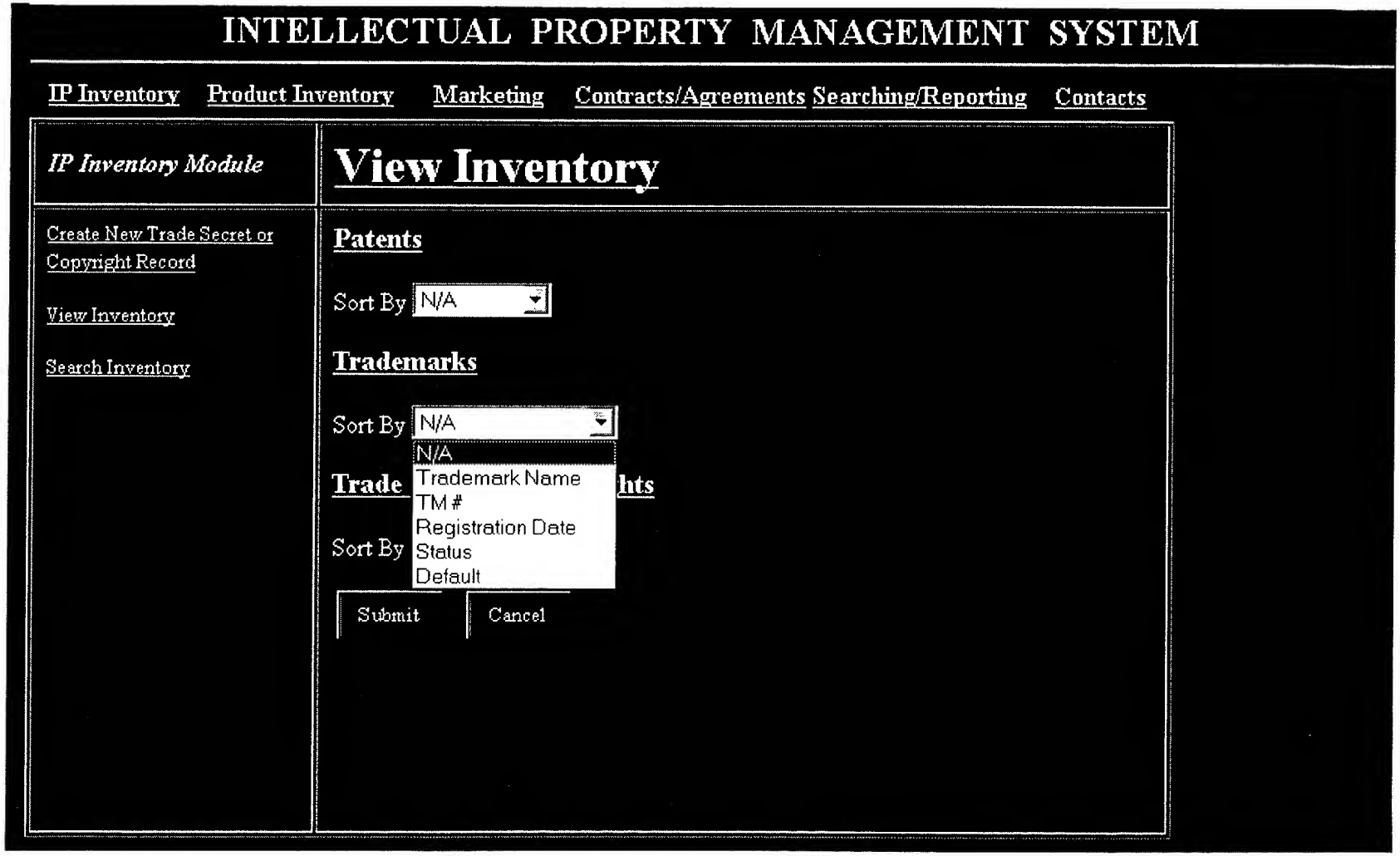

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
IP Inventory Module
View Inventory
Create New Trade Secret or Copyright Record
View Inventory
Search Inventory
Patents
Sort By N/A
Trademarks
Sort By N/A
N/A
Trademark Name
TM #
Registration Date
Status
Default
Trade hts
Sort By
Submit
Cancel

FIG. 55

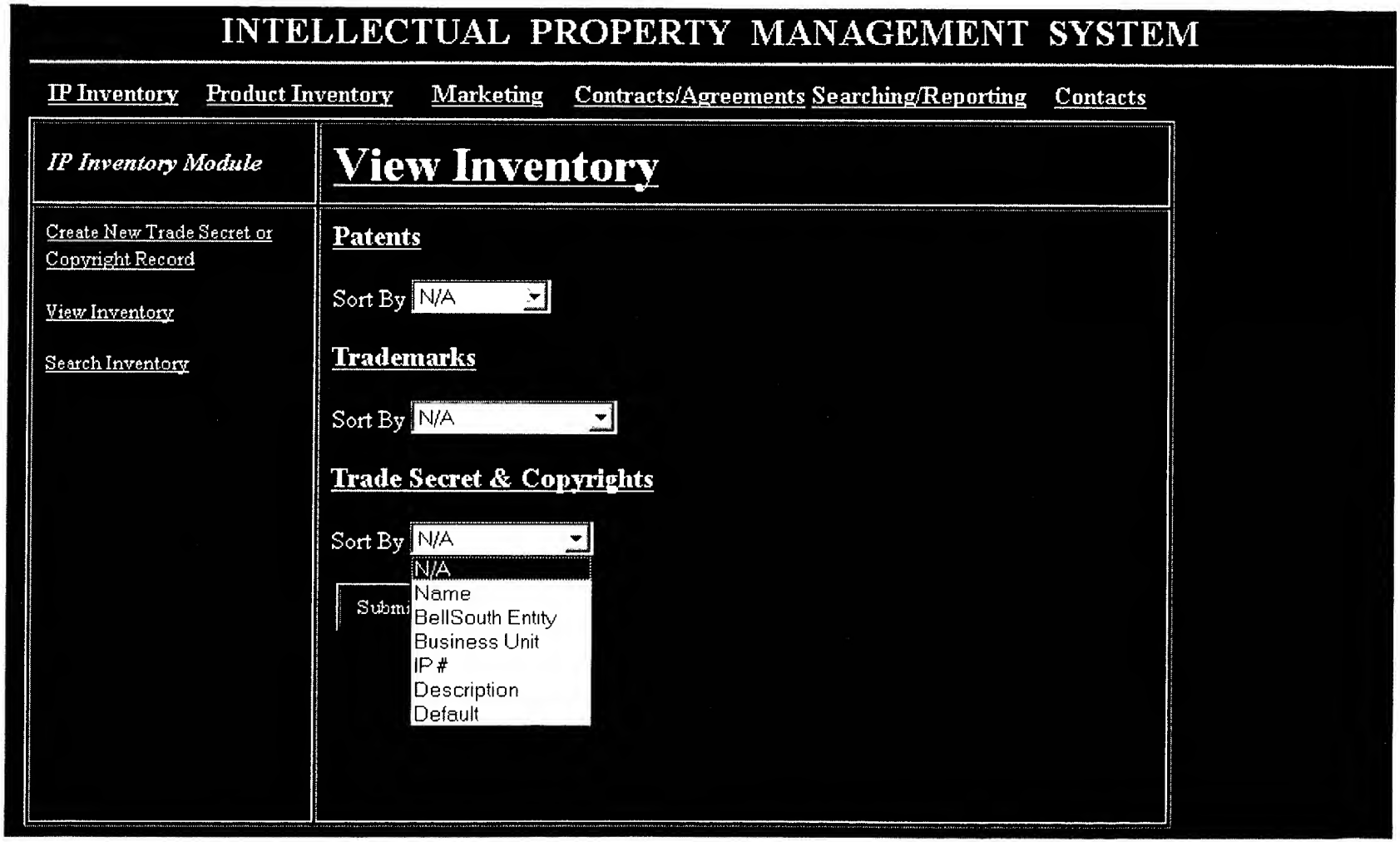

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
IP Inventory Module
View Inventory
Create New Trade Secret or Copyright Record
View Inventory
Search Inventory
Patents
Sort By N/A
Trademarks
Sort By N/A
Trade Secret & Copyrights
Sort By N/A
N/A
Name
BellSouth Entity
Business Unit
IP #
Description
Default

FIG. 56

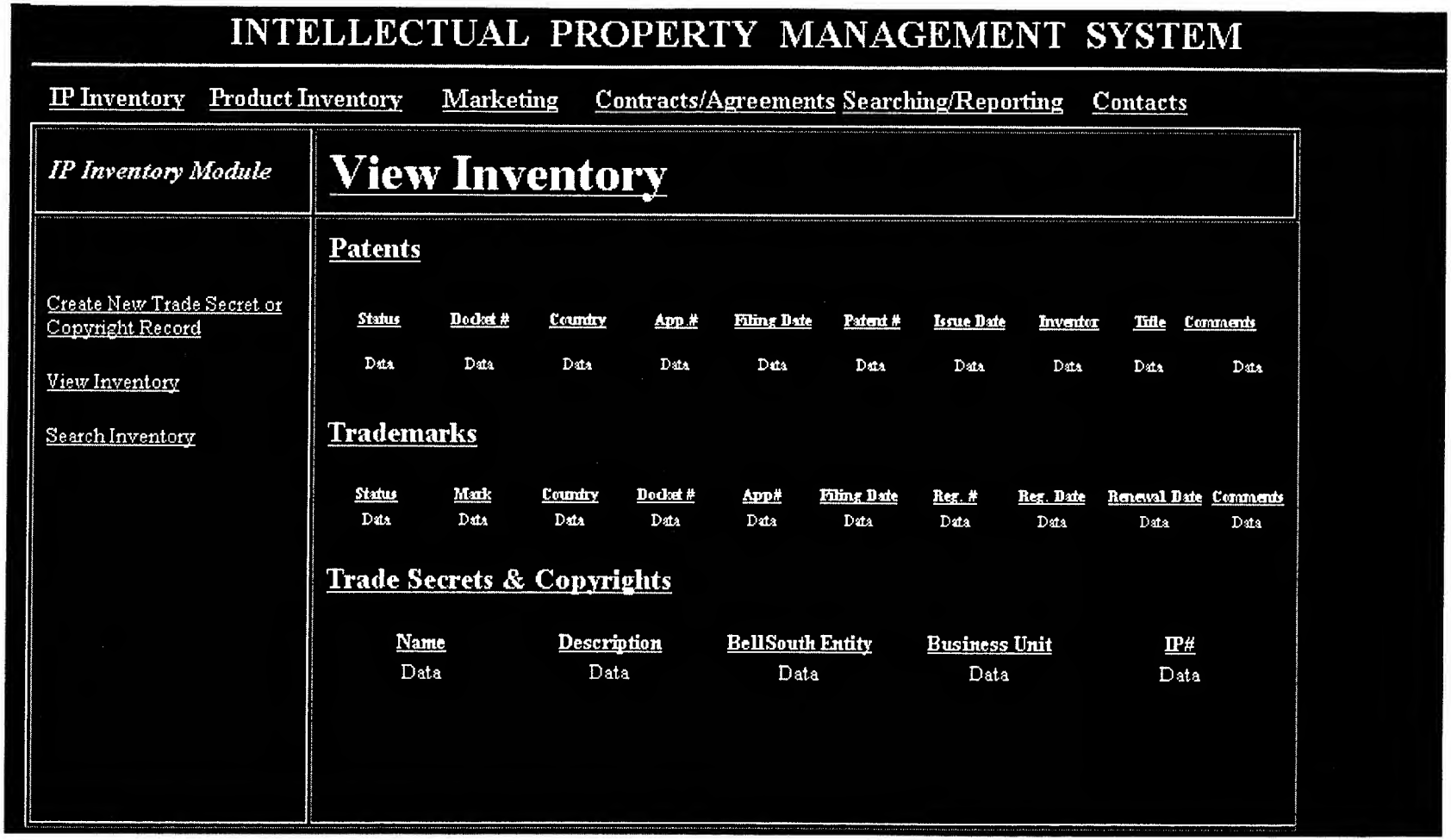

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
IP Inventory Module
View Inventory
Create New Trade Secret or Copyright Record
View Inventory
Search Inventory
Patents
Status
Docket #
Country
App #
Filing Date
Patent #
Issue Date
Inventor
Title
Comments
Data
Trademarks
Status
Mark
Country
Docket #
App#
Filing Date
Reg. #
Reg. Date
Renewal Date
Comments
Data
Trade Secrets & Copyrights
Name
Description
BellSouth Entity
Business Unit
IP#
Data

FIG. 57

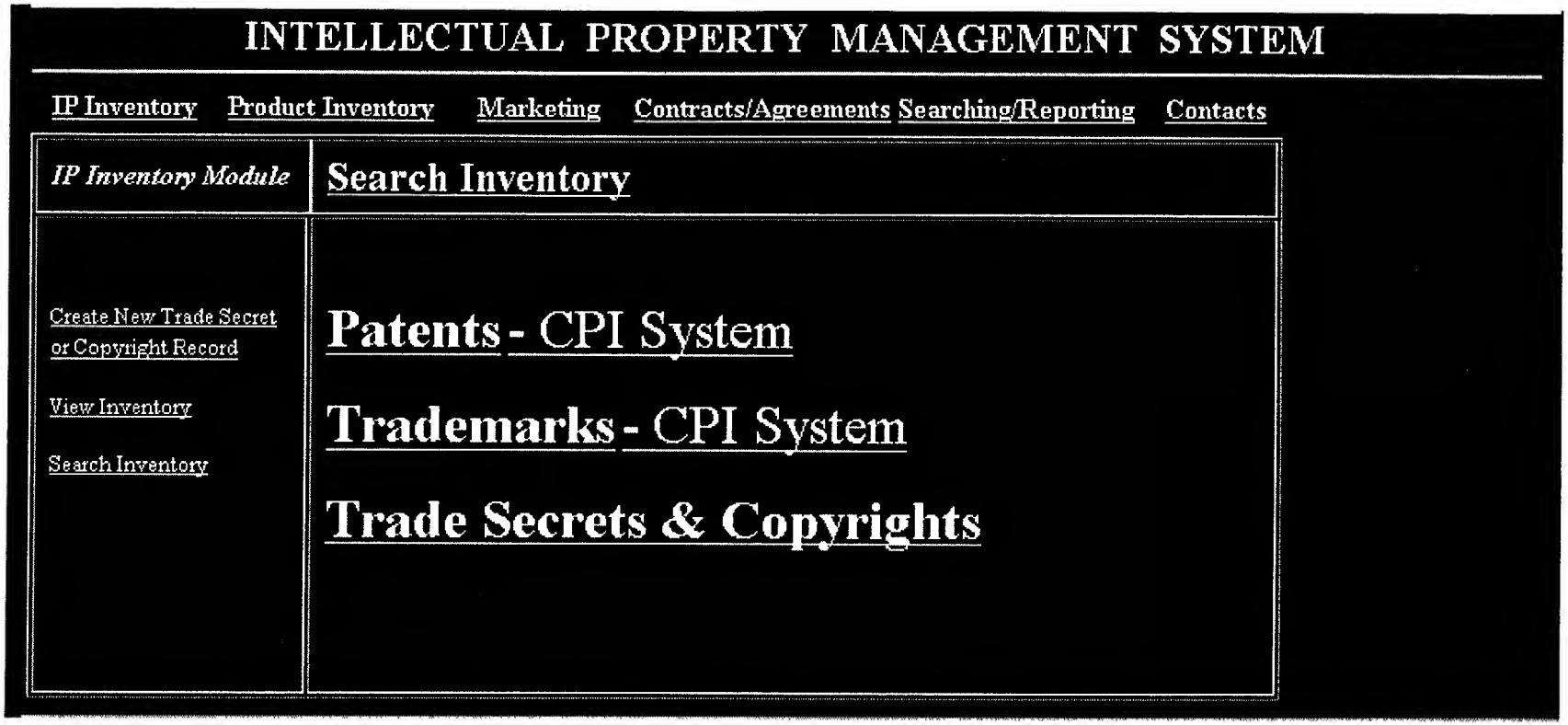

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
IP Inventory Module
Search Inventory
Create New Trade Secret or Copyright Record
View Inventory
Search Inventory
Patents - CPI System
Trademarks - CPI System
Trade Secrets & Copyrights

FIG. 58

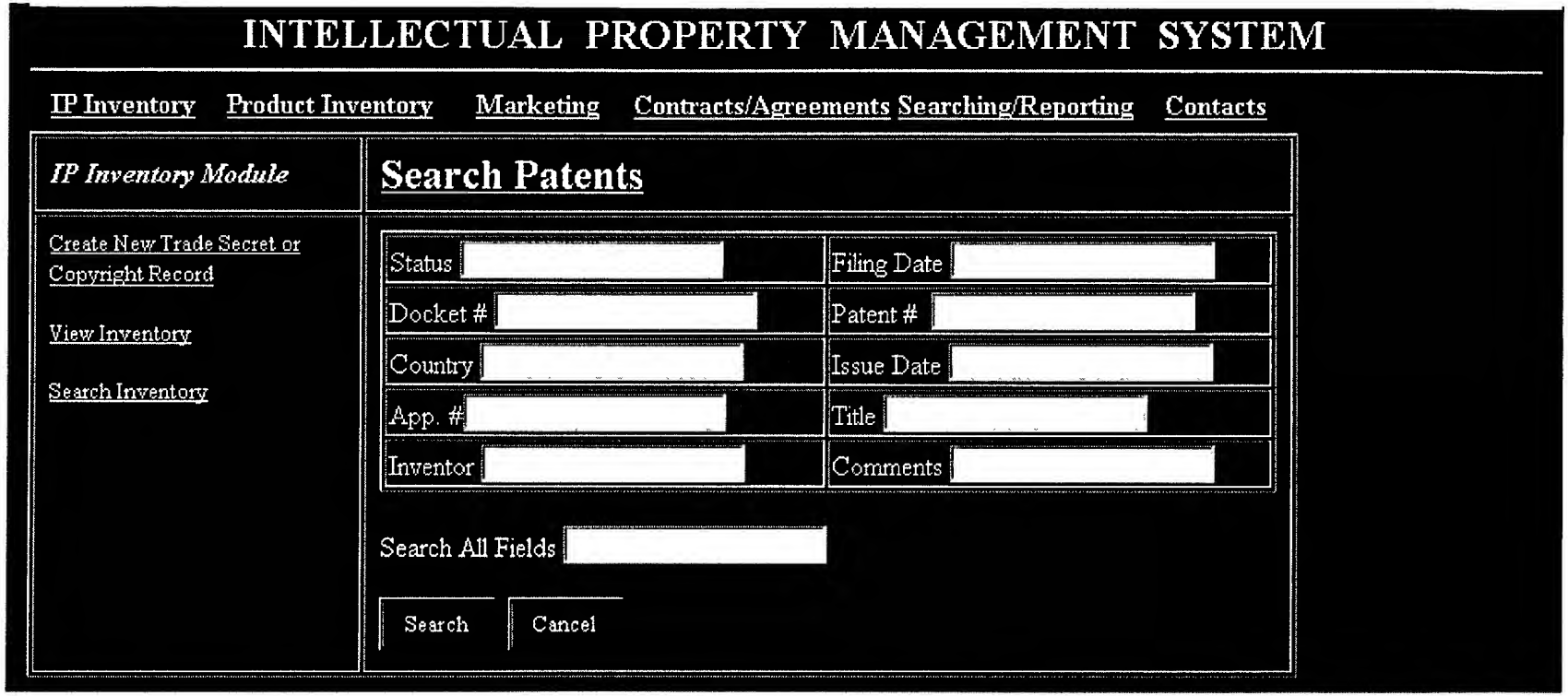

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
IP Inventory Module
Create New Trade Secret or Copyright Record
View Inventory
Search Inventory
Search Patents
Status
Filing Date
Docket #
Patent #
Country
Issue Date
App. #
Title
Inventor
Comments
Search All Fields
Search
Cancel

FIG. 59

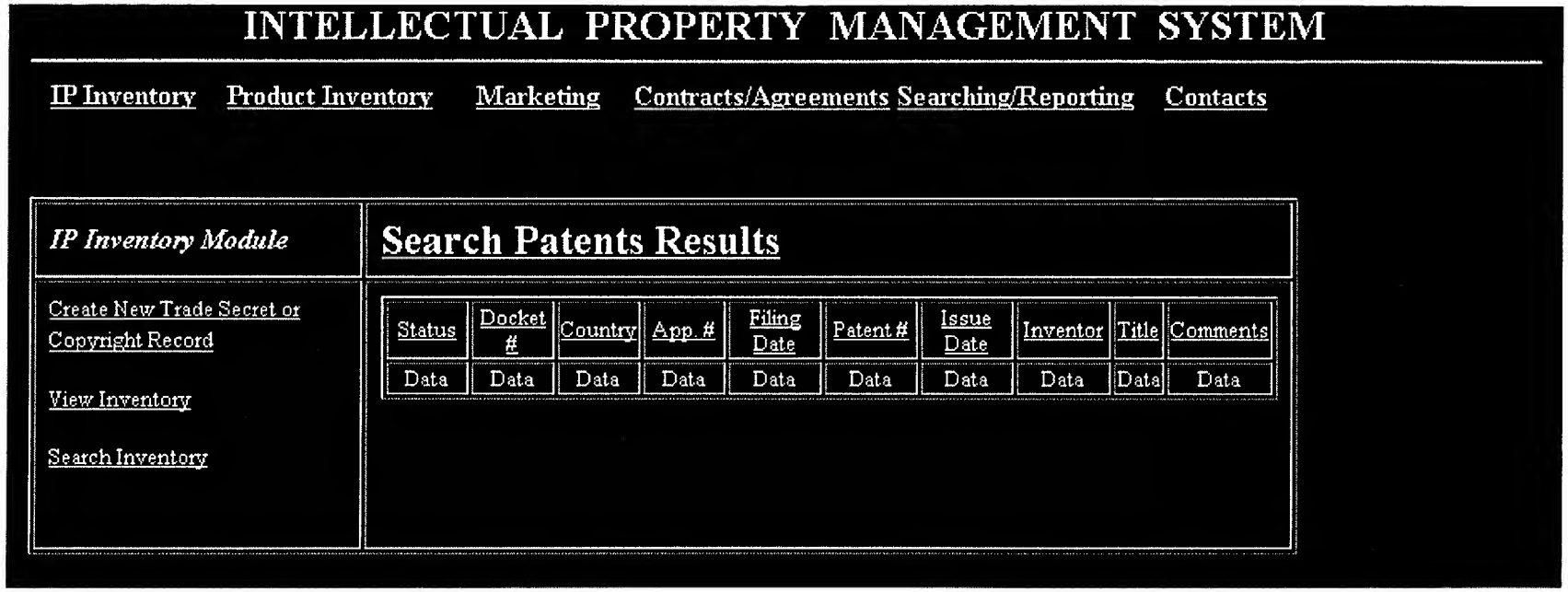

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
IP Inventory Module
Search Patents Results
Create New Trade Secret or Copyright Record
View Inventory
Search Inventory
Status
Docket #
Country
App. #
Filing Date
Patent #
Issue Date
Inventor
Title
Comments
Data
Data
Data
Data
Data
Data
Data
Data
Data
Data

FIG. 60

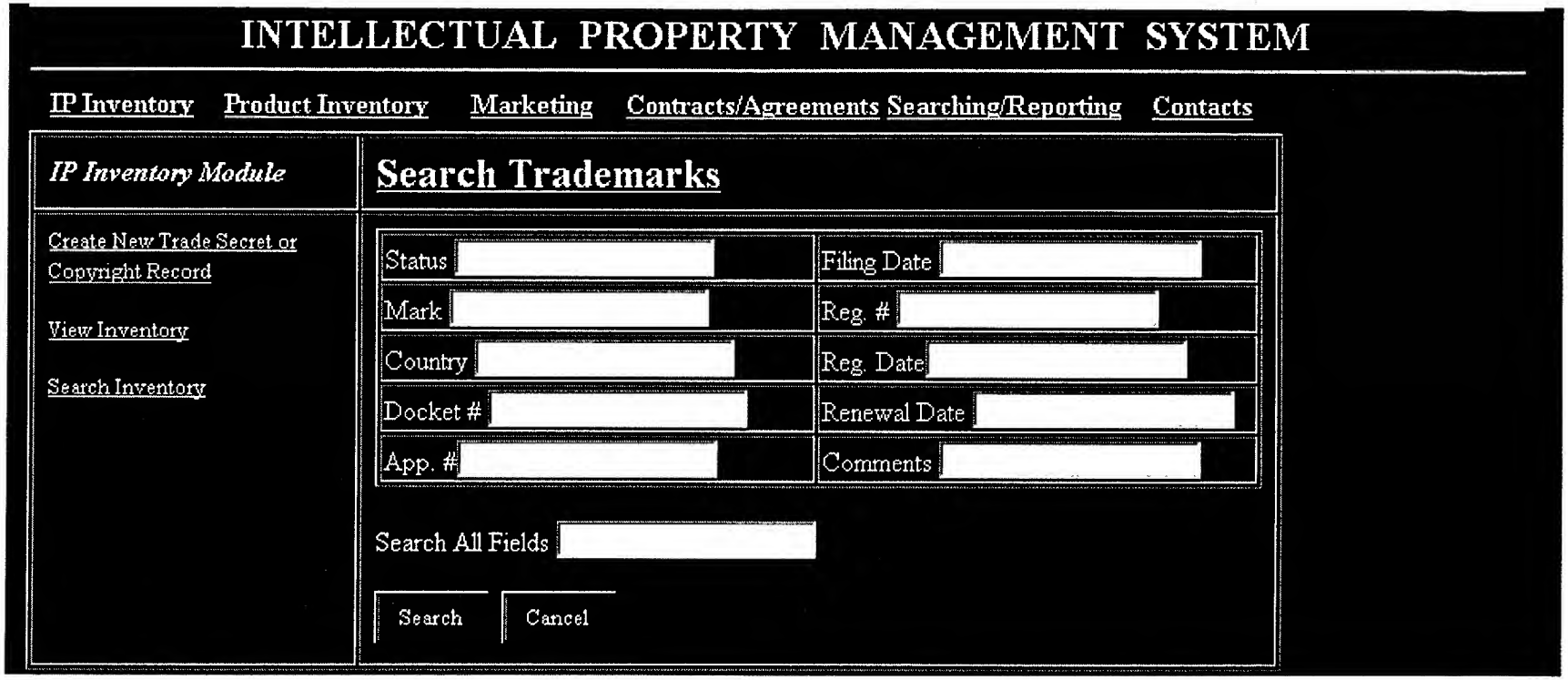

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
IP Inventory Module
Search Trademarks
Create New Trade Secret or Copyright Record
View Inventory
Search Inventory
Status
Filing Date
Mark
Reg. #
Country
Reg. Date
Docket #
Renewal Date
App. #
Comments
Search All Fields
Search
Cancel

FIG. 61

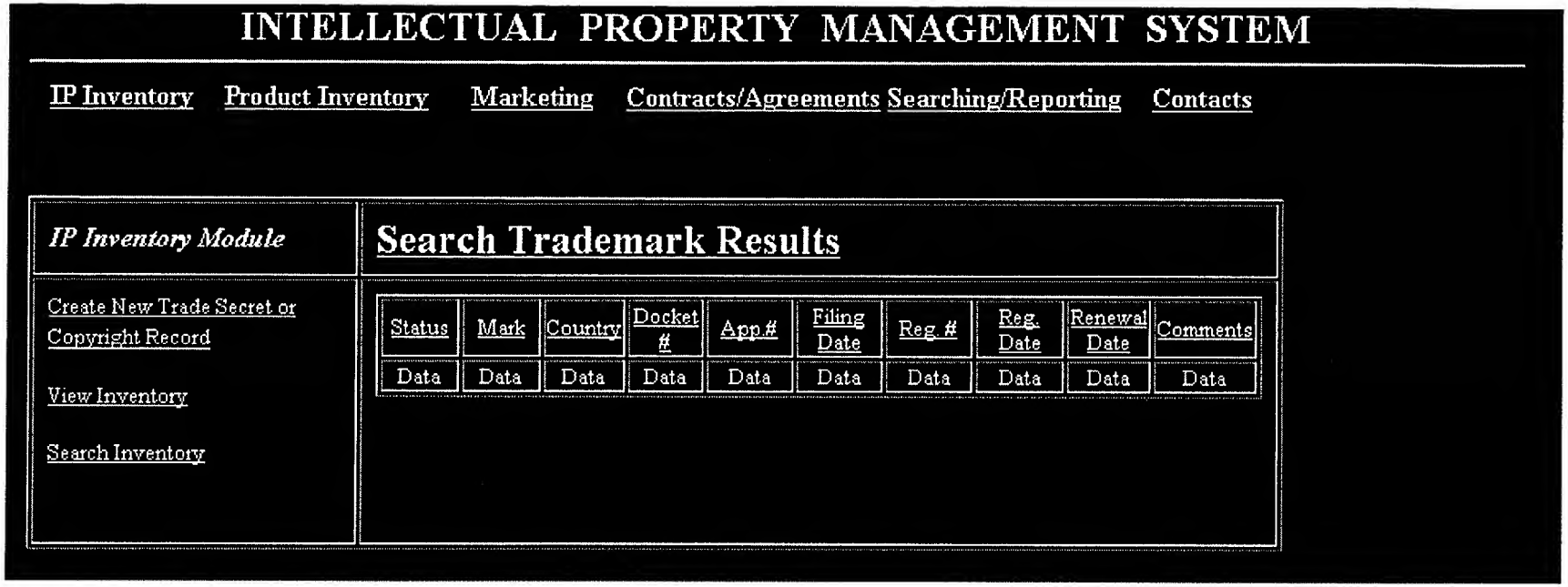

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
IP Inventory Module
Create New Trade Secret or Copyright Record
View Inventory
Search Inventory
Search Trademark Results
Status
Mark
Country
Docket #
App.#
Filing Date
Reg. #
Reg. Date
Renewal Date
Comments
Data
Data
Data
Data
Data
Data
Data
Data
Data
Data

FIG. 62

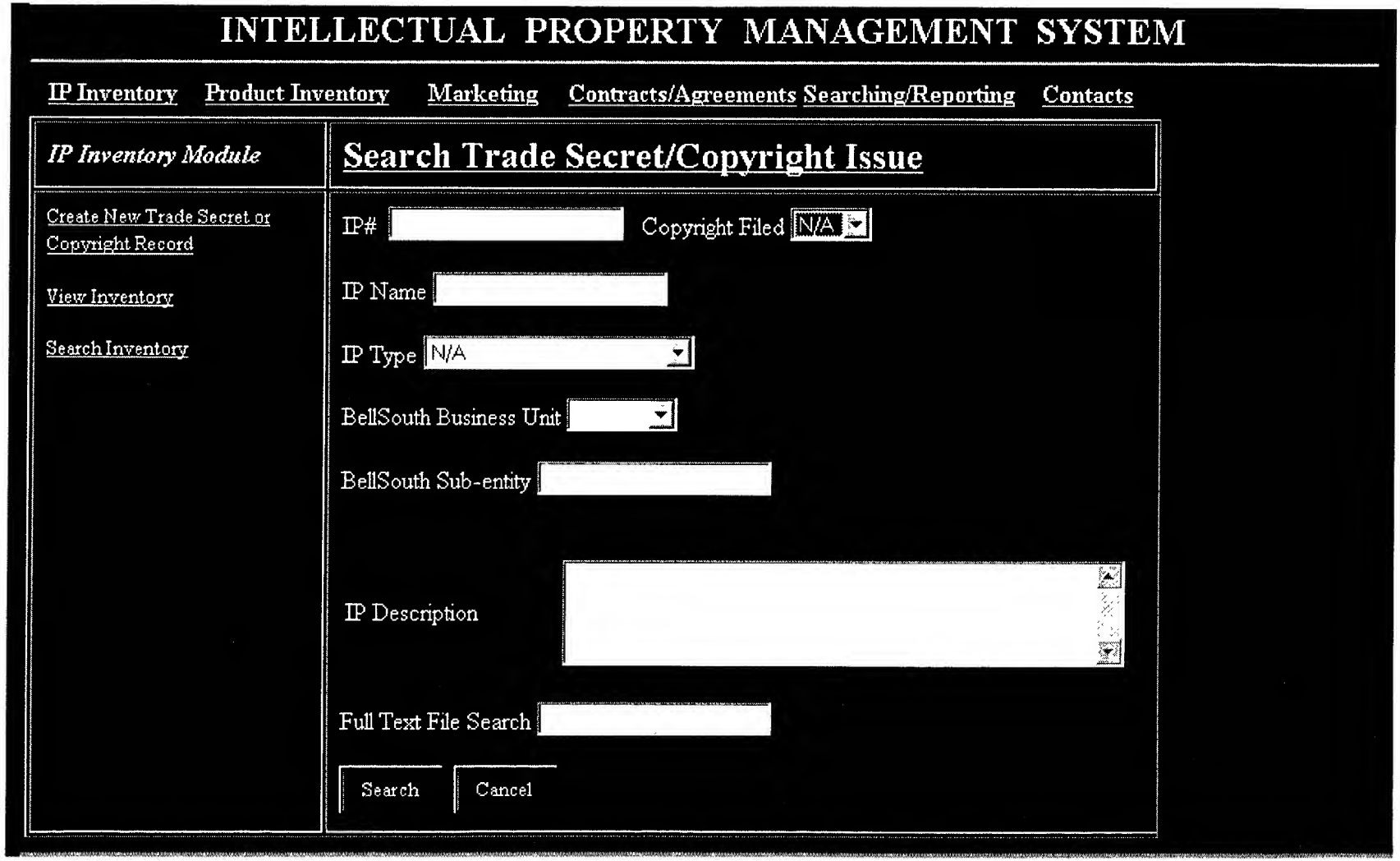

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
IP Inventory Module
Search Trade Secret/Copyright Issue
Create New Trade Secret or Copyright Record
View Inventory
Search Inventory
IP#
Copyright Filed
N/A
IP Name
IP Type
N/A
BellSouth Business Unit
BellSouth Sub-entity
IP Description
Full Text File Search
Search
Cancel

FIG. 63

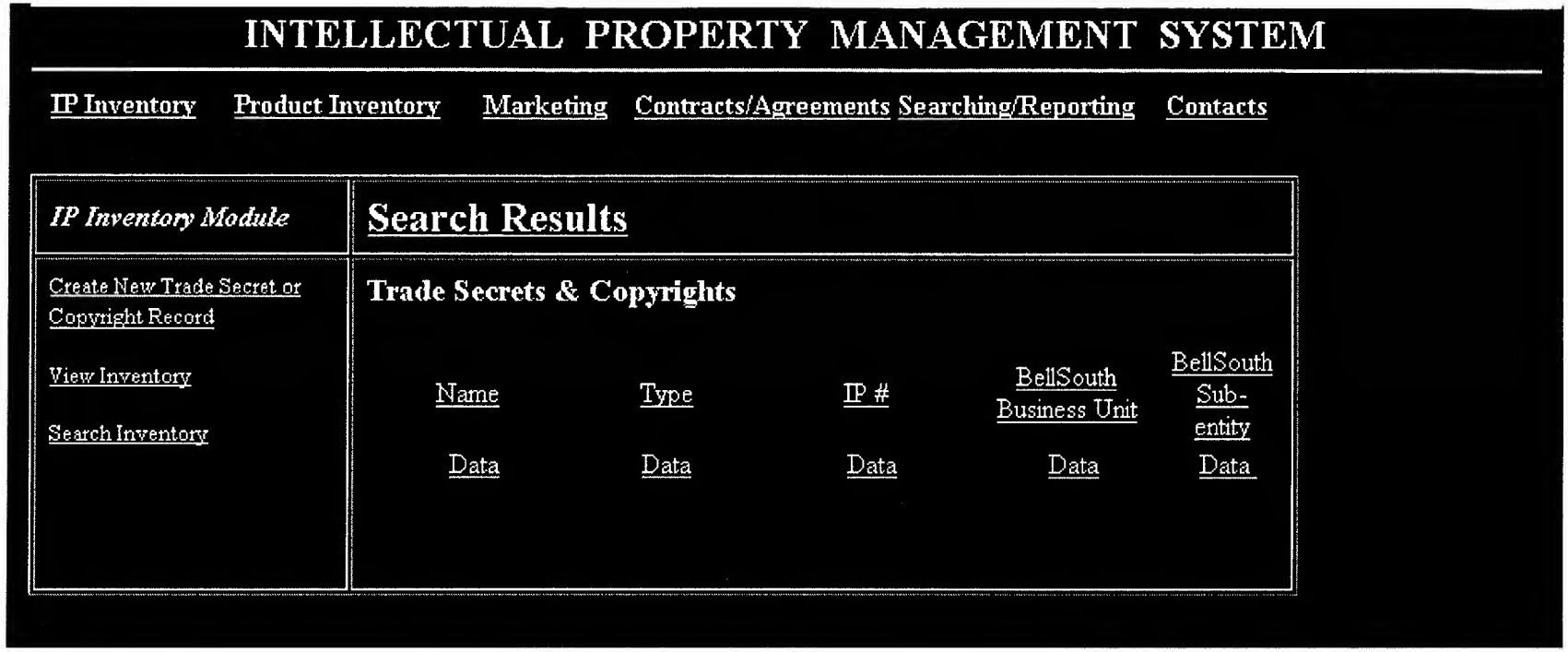

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
IP Inventory Module
Search Results
Create New Trade Secret or Copyright Record
View Inventory
Search Inventory
Trade Secrets & Copyrights
Name
Type
IP #
BellSouth Business Unit
BellSouth Sub-entity
Data
Data
Data
Data
Data

FIG. 64

Microsoft Confidential

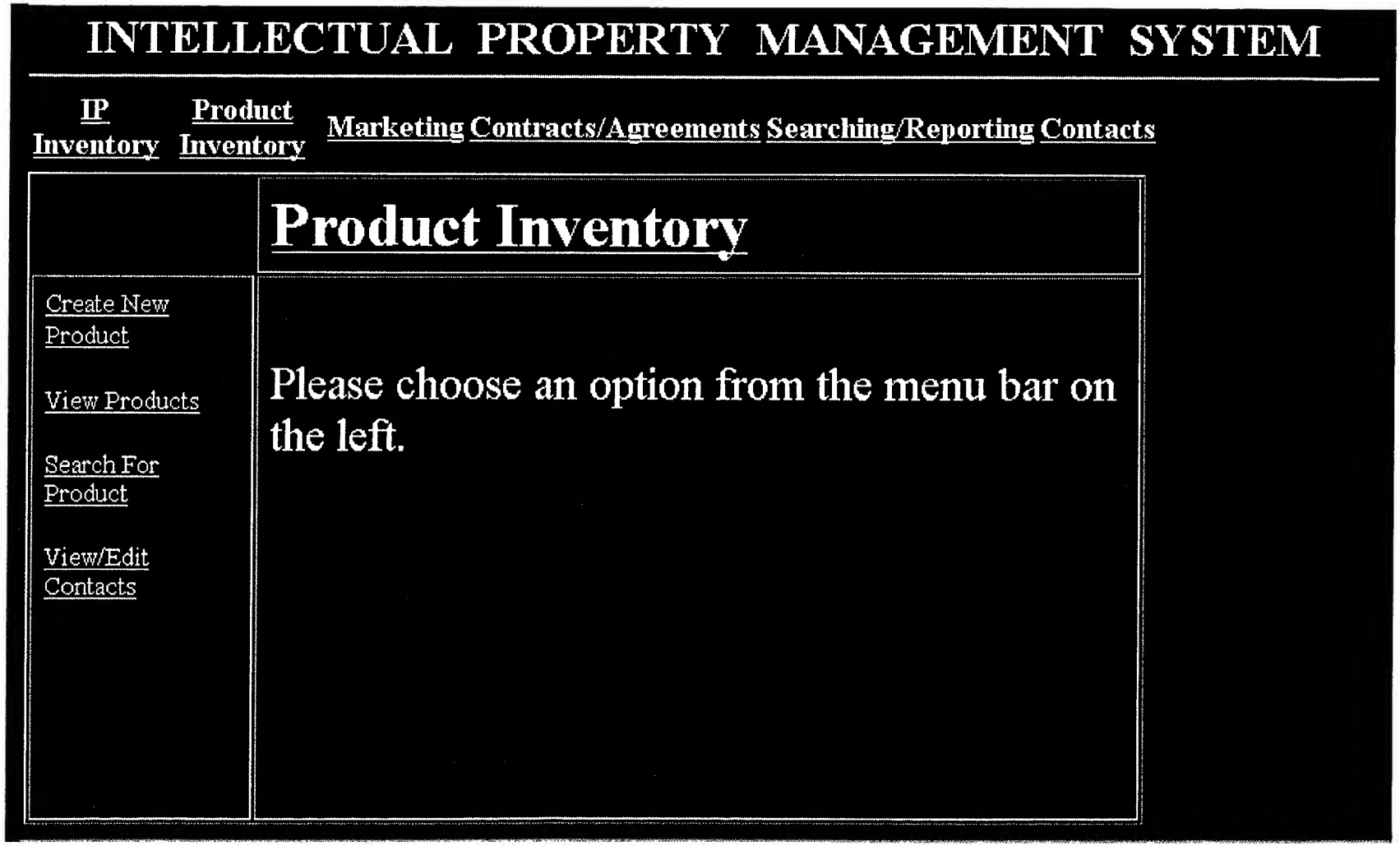


FIG. 65

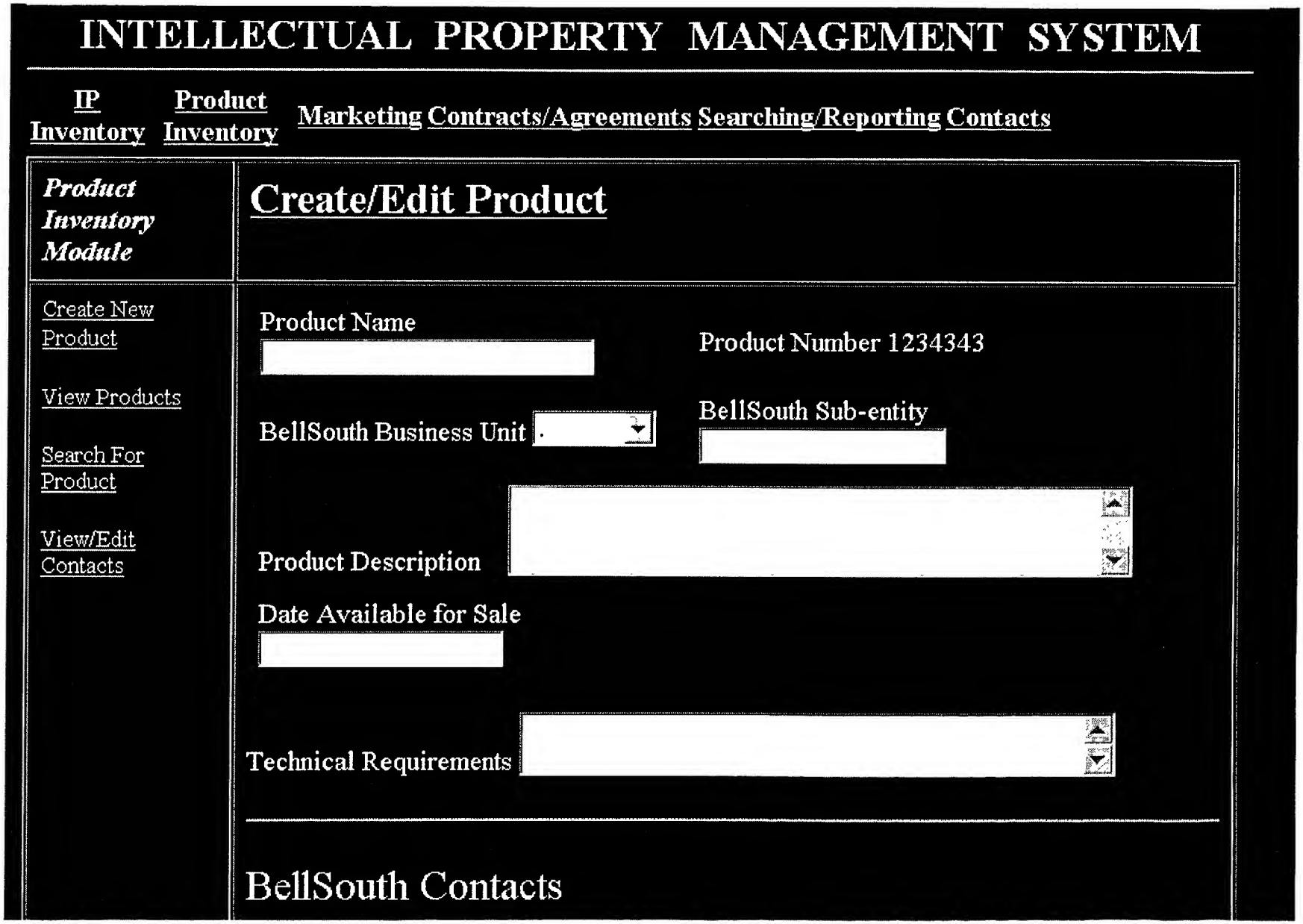

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Product Inventory Module
Create/Edit Product
Create New Product
View Products
Search For Product
View/Edit Contacts
Product Name
Product Number 1234343
BellSouth Business Unit
BellSouth Sub-entity
Product Description
Date Available for Sale
Technical Requirements
BellSouth Contacts

FIG. 66

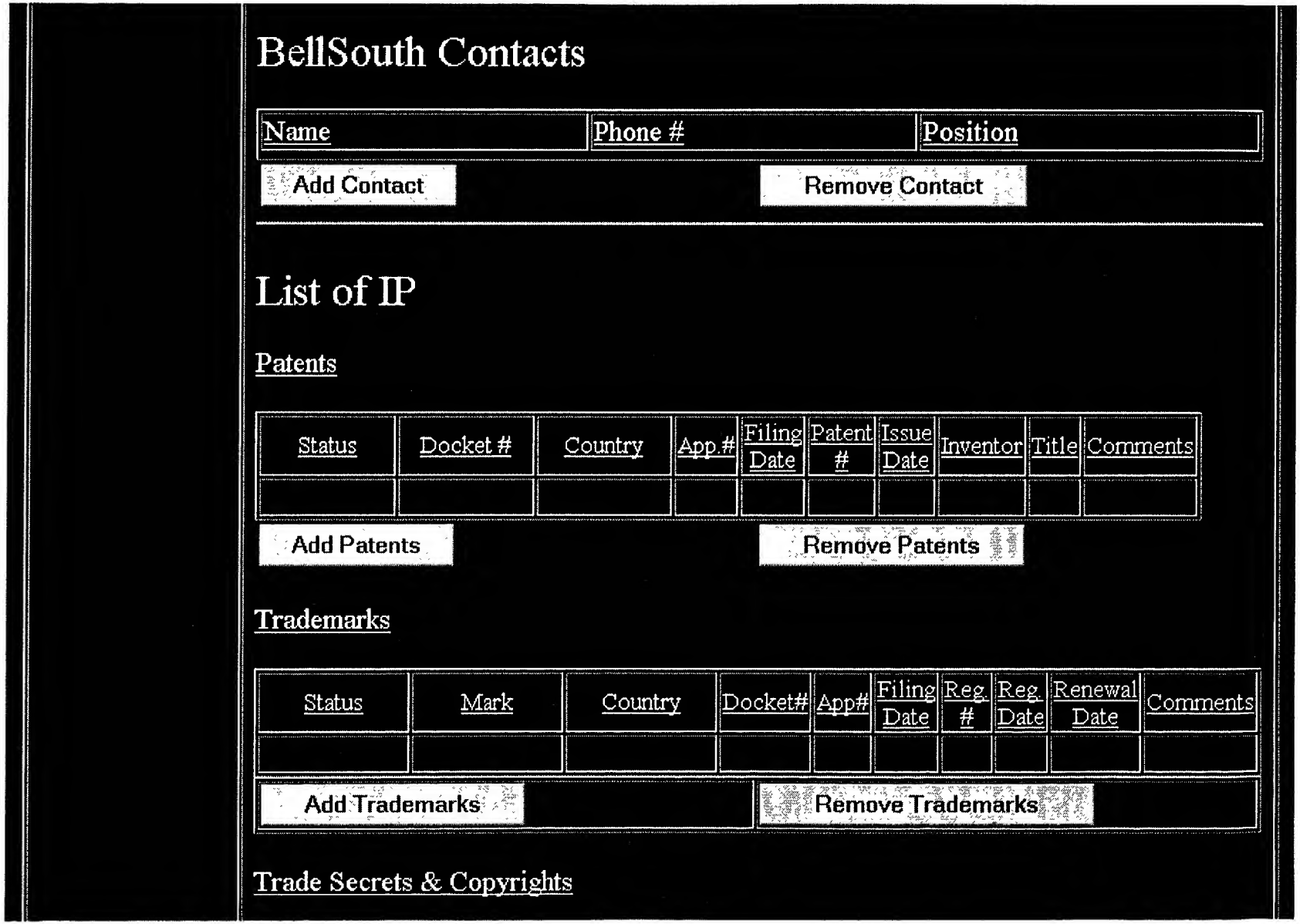

BellSouth Contacts
Name
Phone #
Position
Add Contact
Remove Contact
List of IP
Patents
Status
Docket #
Country
App.#
Filing Date
Patent #
Issue Date
Inventor
Title
Comments
Add Patents
Remove Patents
Trademarks
Status
Mark
Country
Docket#
App#
Filing Date
Reg. #
Reg. Date
Renewal Date
Comments
Add Trademarks
Remove Trademarks
Trade Secrets & Copyrights

FIG. 67

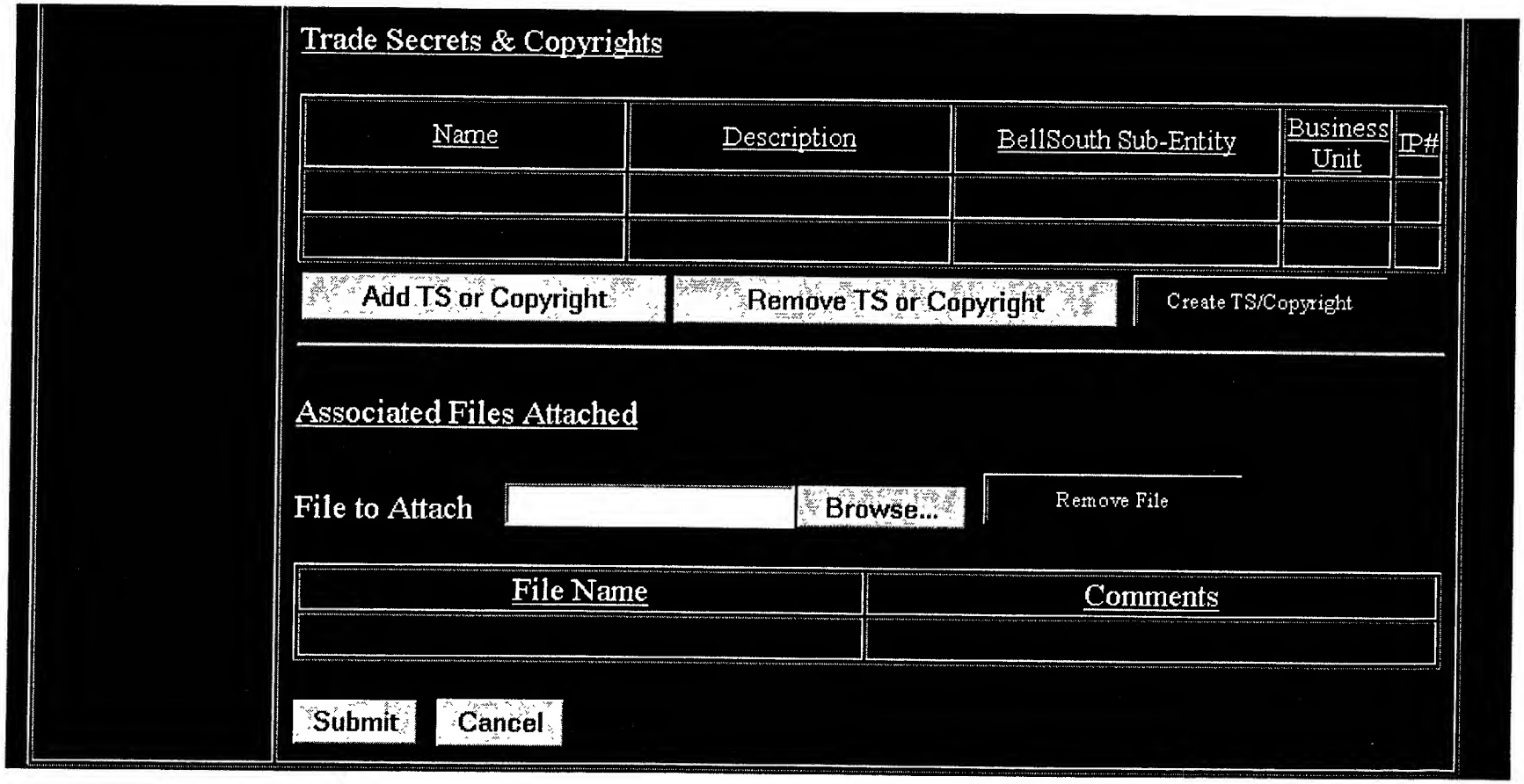

Trade Secrets & Copyrights
Name
Description
BellSouth Sub-Entity
Business Unit
IP#
Add TS or Copyright
Remove TS or Copyright
Create TS/Copyright
Associated Files Attached
File to Attach
Browse...
Remove File
File Name
Comments
Submit
Cancel

FIG. 68

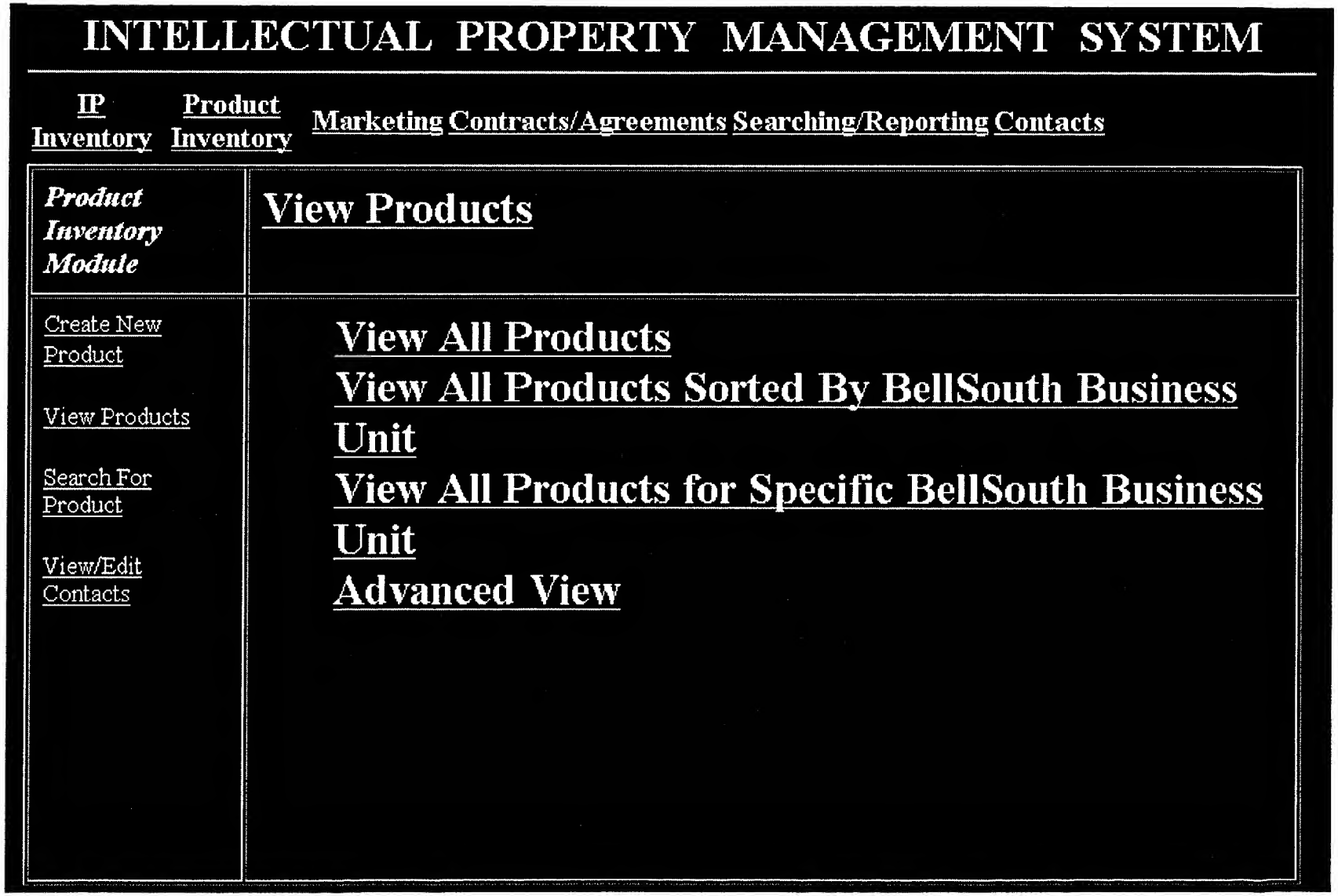

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Product Inventory Module
View Products
Create New Product
View Products
Search For Product
View/Edit Contacts
View All Products
View All Products Sorted By BellSouth Business Unit
View All Products for Specific BellSouth Business Unit
Advanced View

FIG. 69

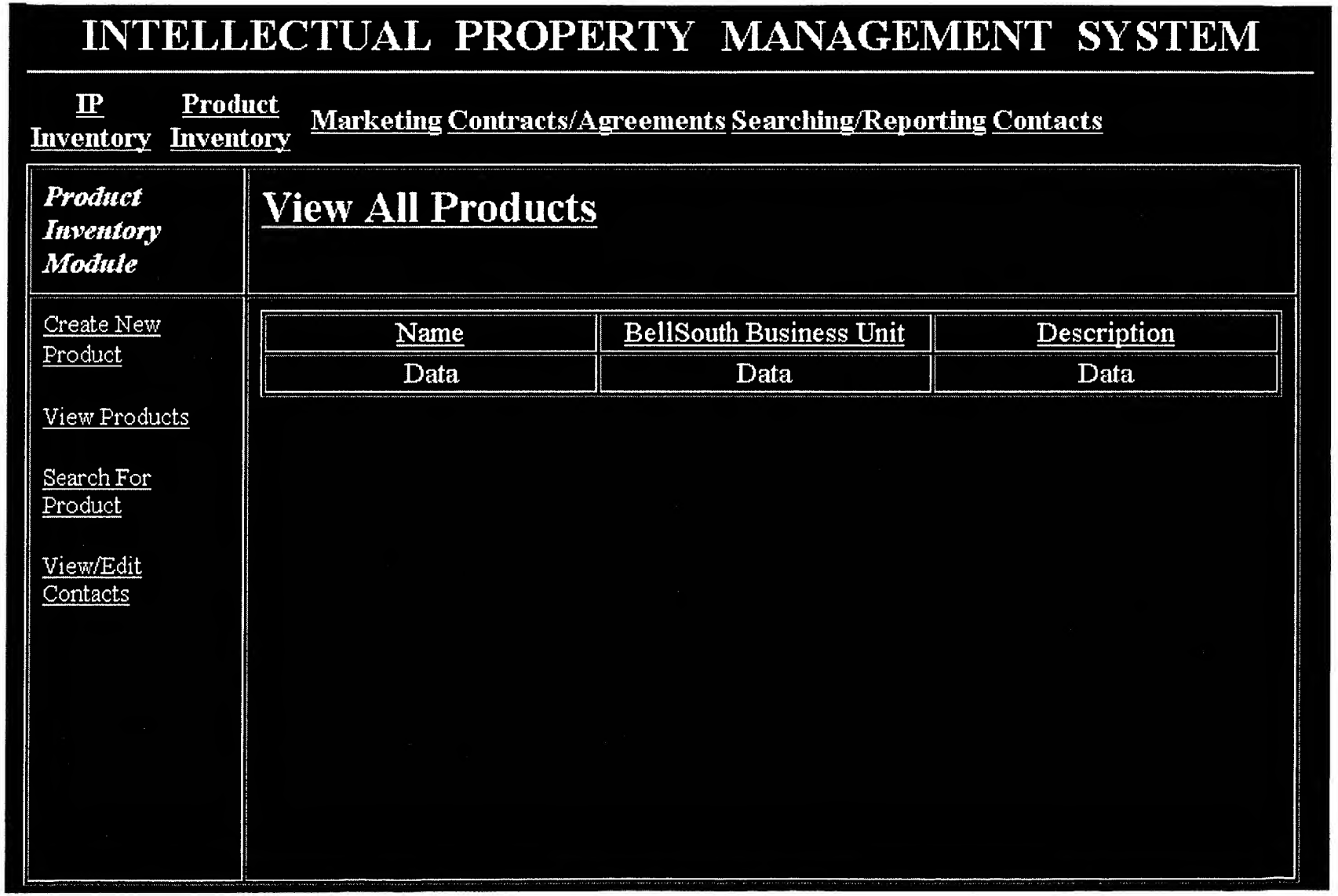

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Product Inventory Module
View All Products
Create New Product
View Products
Search For Product
View/Edit Contacts
Name
BellSouth Business Unit
Description
Data
Data
Data

FIG. 70

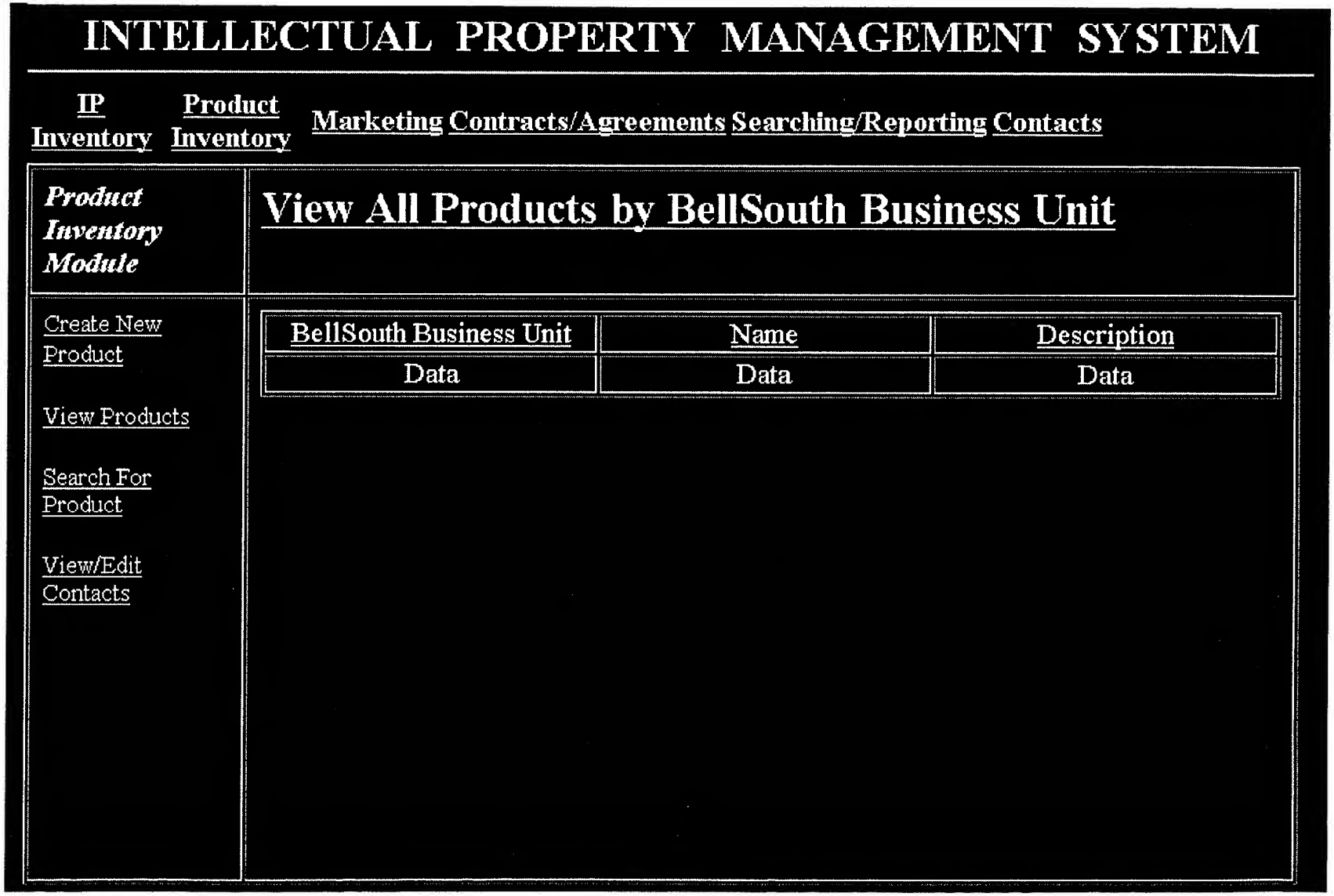

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Product Inventory Module
View All Products by BellSouth Business Unit
Create New Product
View Products
Search For Product
View/Edit Contacts
BellSouth Business Unit
Name
Description
Data
Data
Data

FIG. 71

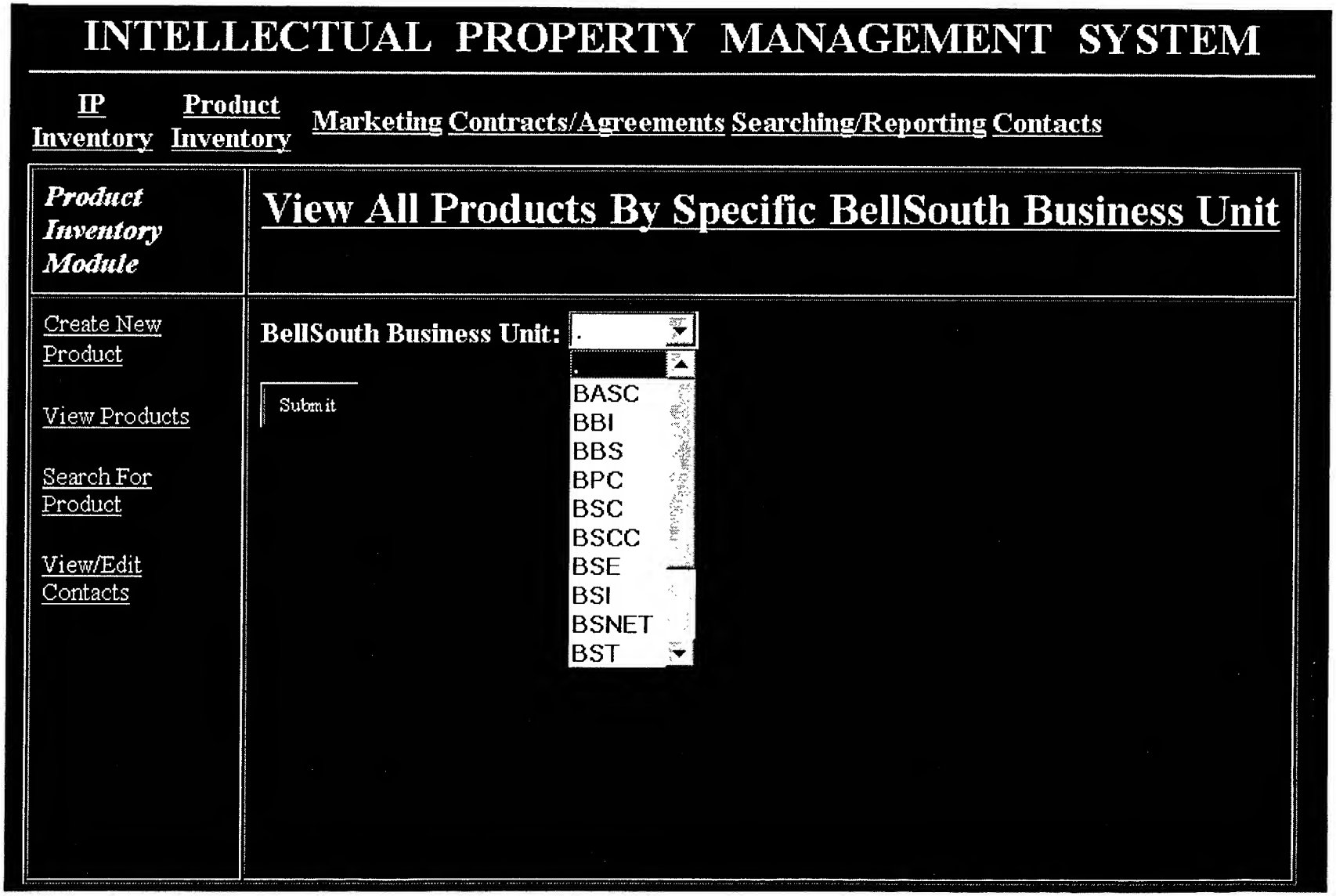

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Product Inventory Module
View All Products By Specific BellSouth Business Unit
Create New Product
View Products
Search For Product
View/Edit Contacts
BellSouth Business Unit:
Submit
BASC
BBI
BBS
BPC
BSC
BSCC
BSE
BSI
BSNET
BST

FIG. 72

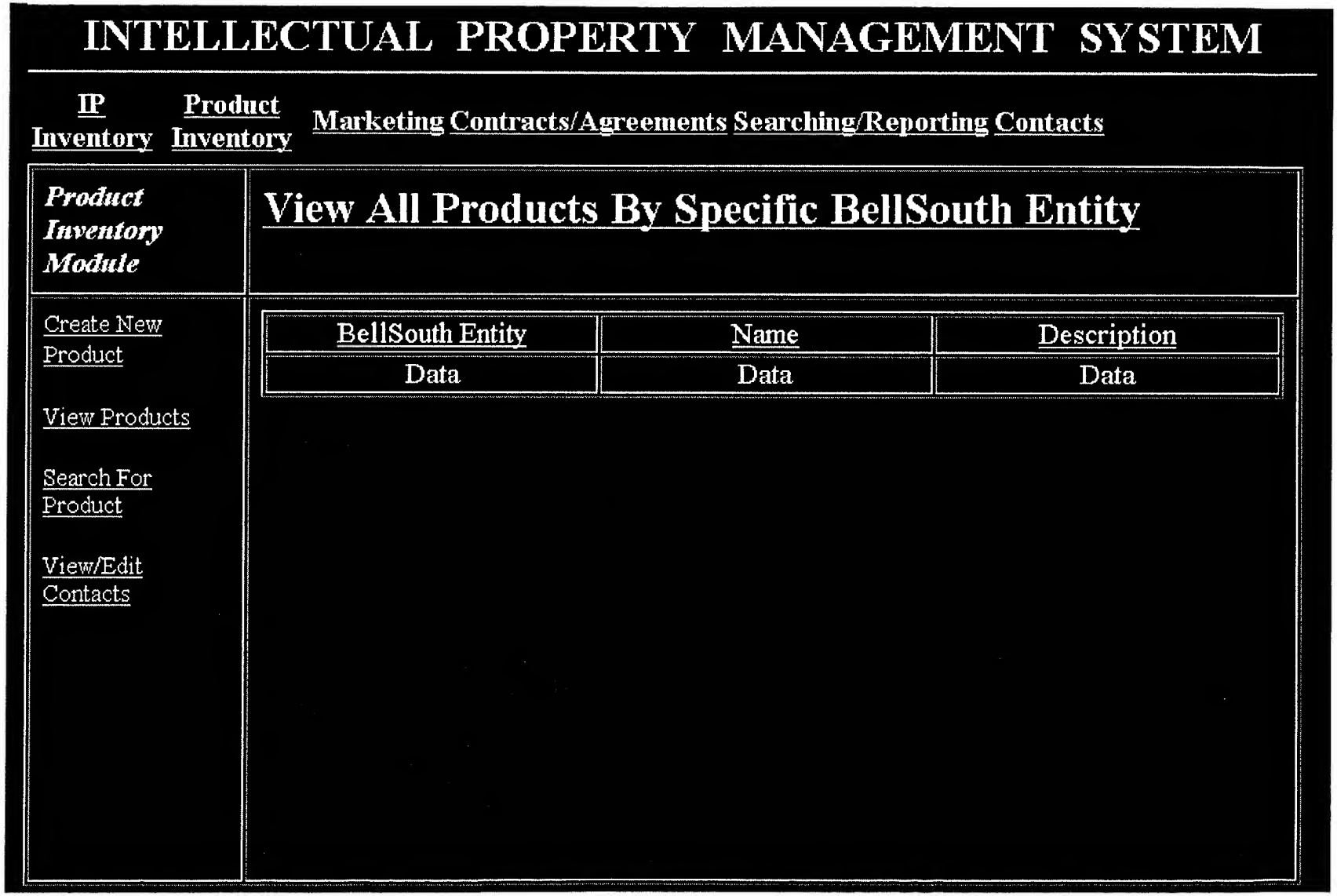

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Product Inventory Module
View All Products By Specific BellSouth Entity
Create New Product
View Products
Search For Product
View/Edit Contacts
BellSouth Entity
Name
Description
Data
Data
Data

FIG. 73

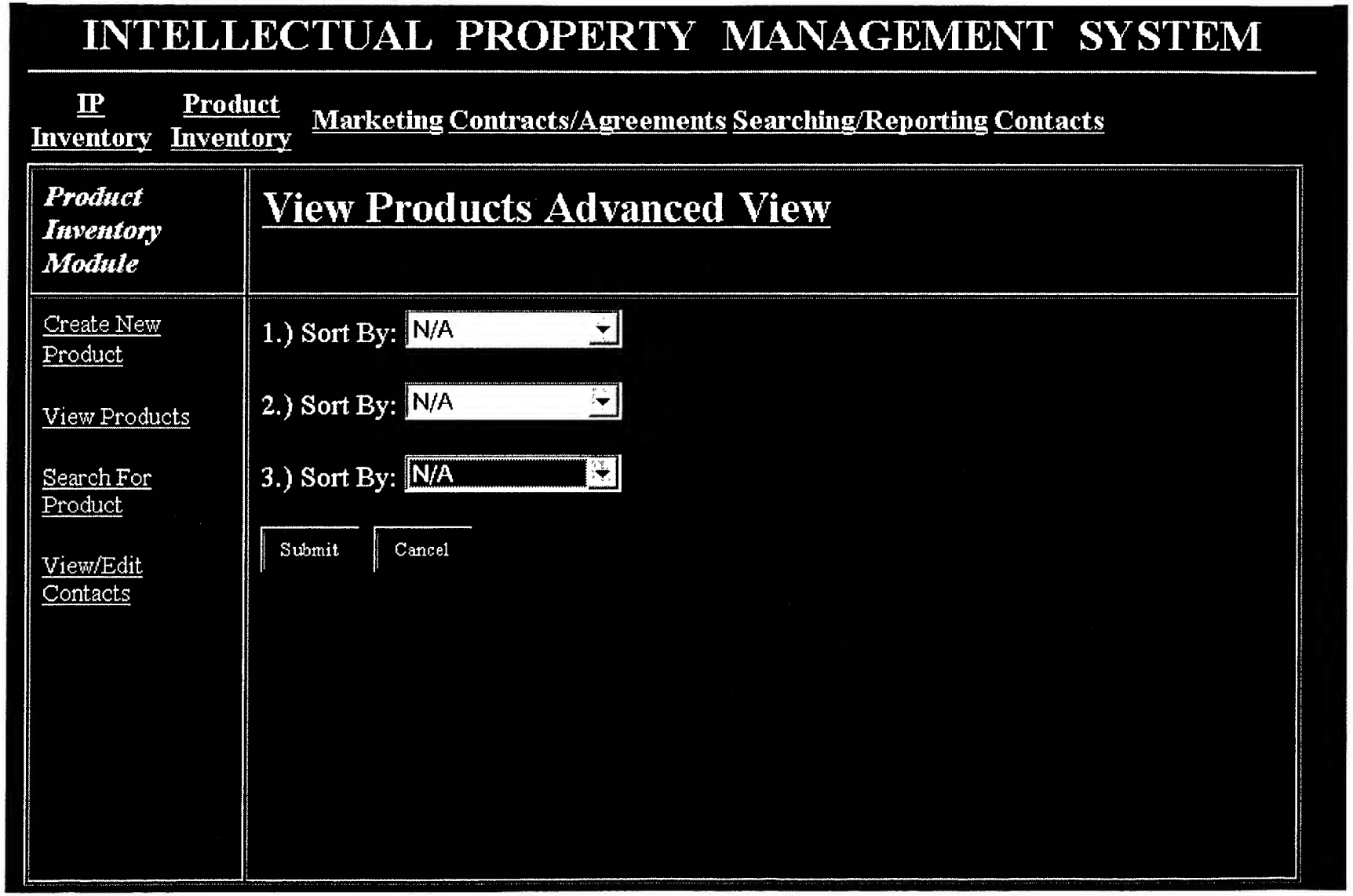

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Product Inventory Module
View Products Advanced View
Create New Product
View Products
Search For Product
View/Edit Contacts
1.) Sort By: N/A
2.) Sort By: N/A
3.) Sort By: N/A
Submit
Cancel

FIG. 74

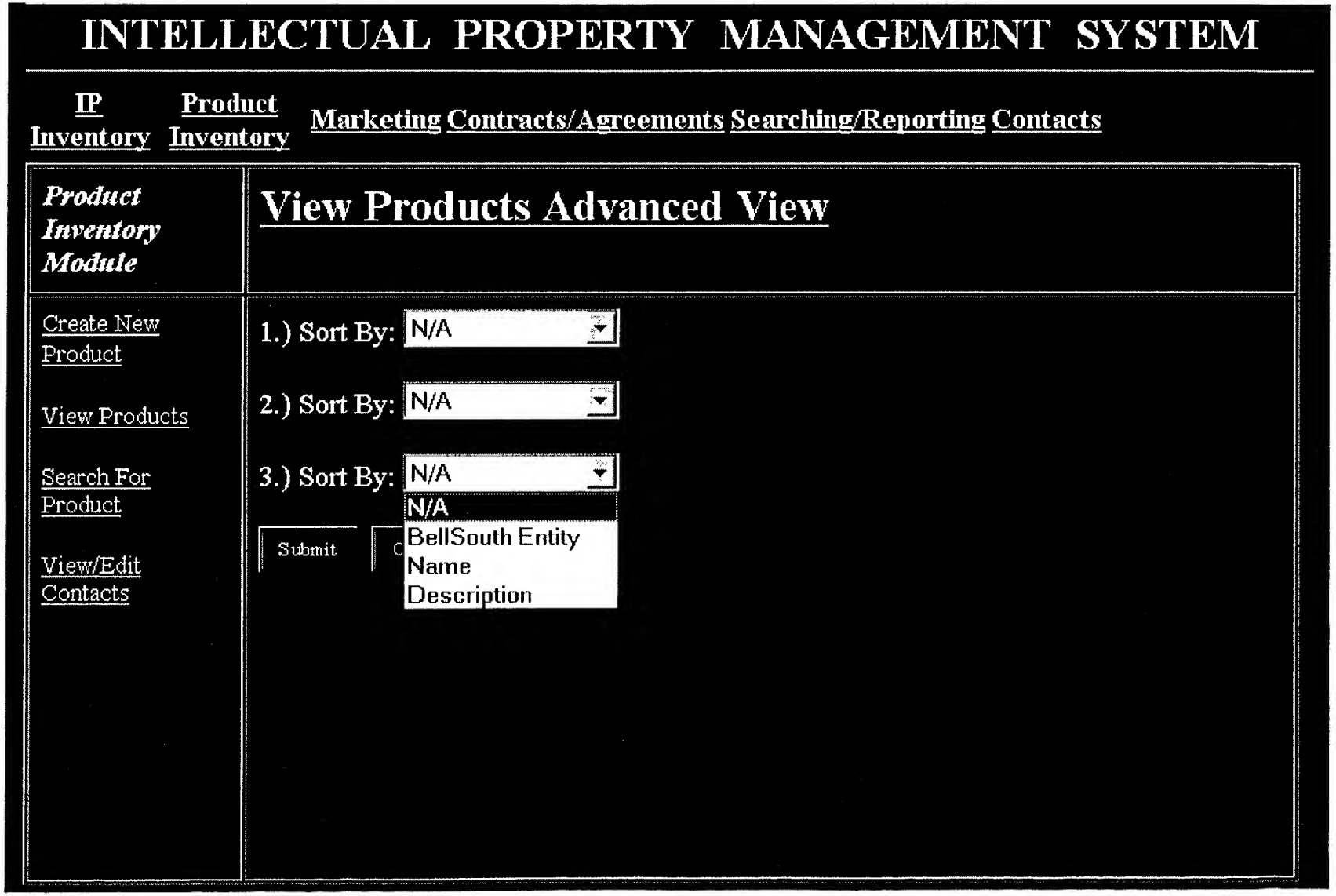

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Product Inventory Module
View Products Advanced View
Create New Product
View Products
Search For Product
View/Edit Contacts
1.) Sort By: N/A
2.) Sort By: N/A
3.) Sort By: N/A
N/A
BellSouth Entity
Name
Description
Submit

FIG. 75

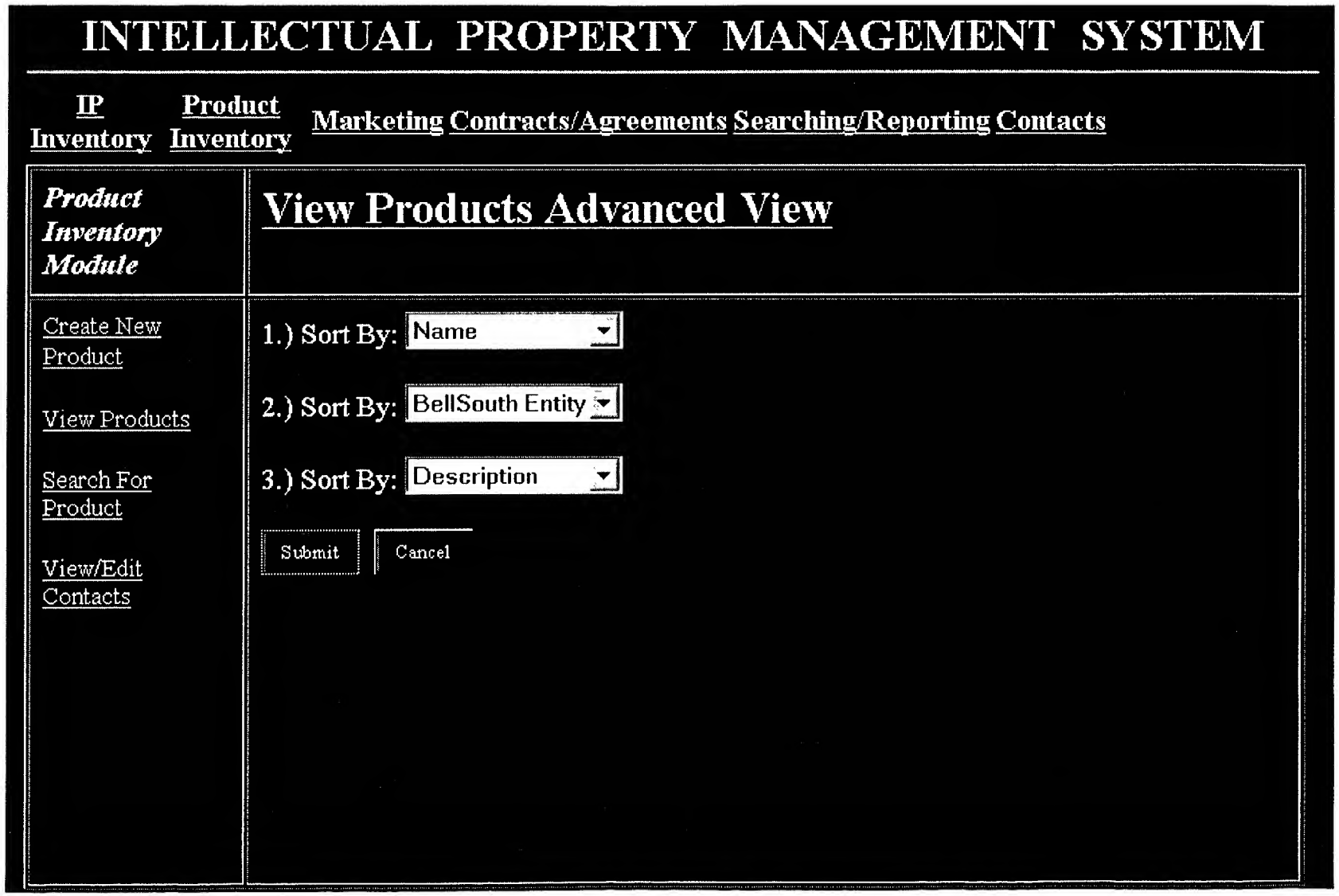

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Product Inventory Module
View Products Advanced View
Create New Product
View Products
Search For Product
View/Edit Contacts
1.) Sort By: Name
2.) Sort By: BellSouth Entity
3.) Sort By: Description
Submit
Cancel

FIG. 76

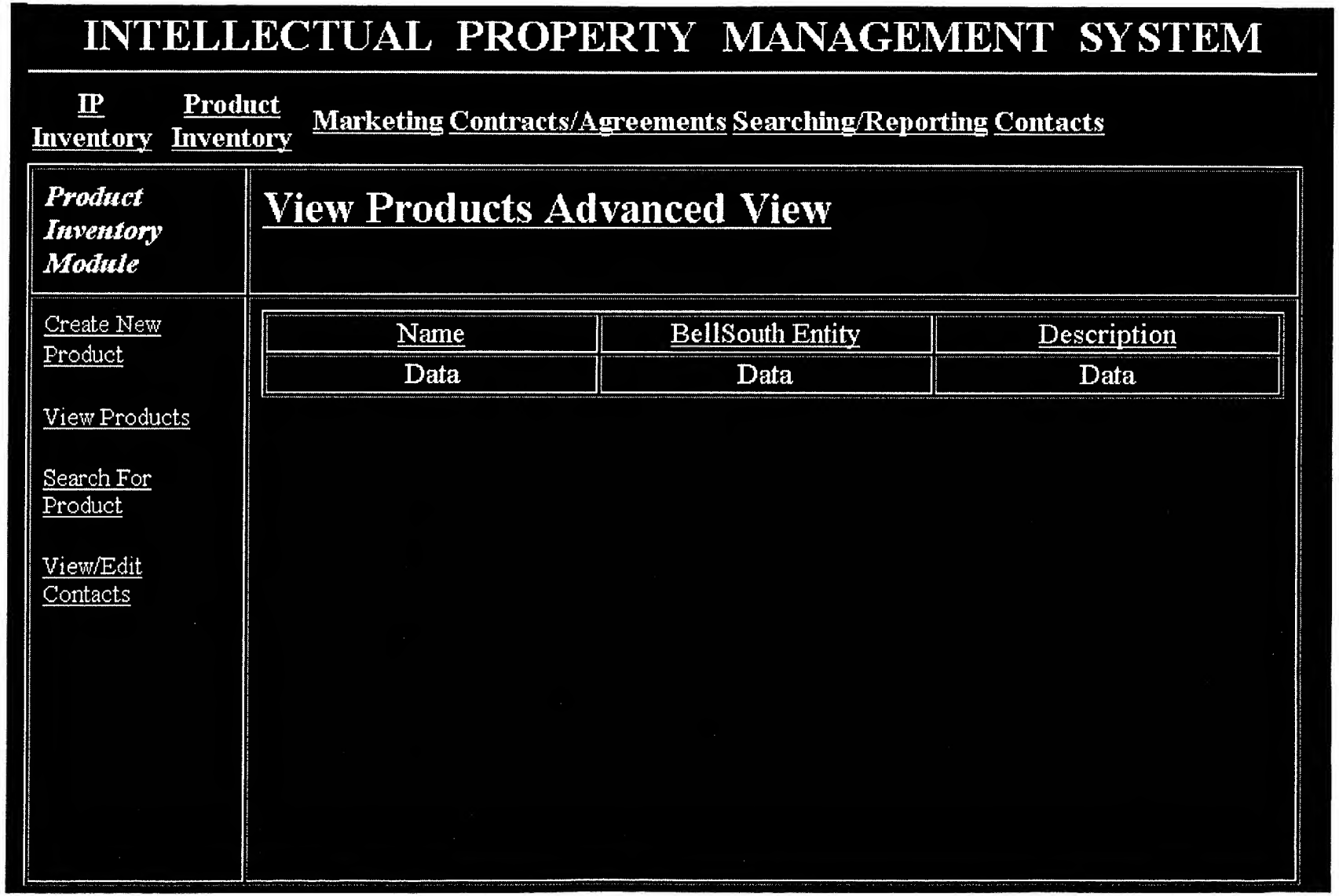

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Product Inventory Module
View Products Advanced View
Create New Product
View Products
Search For Product
View/Edit Contacts
Name
BellSouth Entity
Description
Data
Data
Data

FIG. 77

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Product Inventory Module
Search Products
Create New Product
View Products
Search For Product
View/Edit Contacts
Product Number
Product Name
BellSouth Business Unit
BellSouth Sub-entity
Product Description
Date Available for Sale
Technical Requirements
BellSouth Contacts

FIG. 78

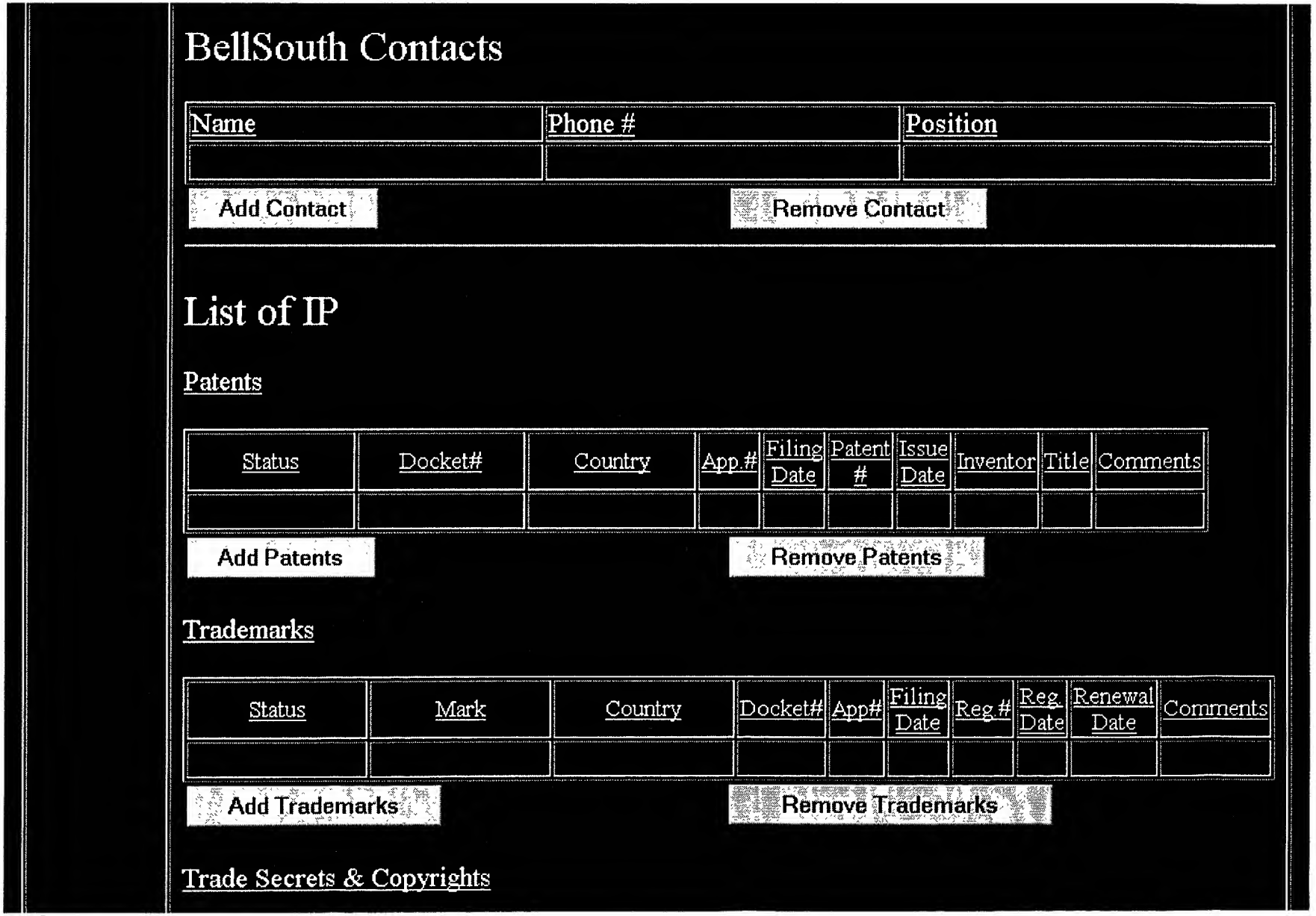

BellSouth Contacts
Name
Phone #
Position
Add Contact
Remove Contact
List of IP
Patents
Status
Docket#
Country
App.#
Filing Date
Patent #
Issue Date
Inventor
Title
Comments
Add Patents
Remove Patents
Trademarks
Status
Mark
Country
Docket#
App#
Filing Date
Reg.#
Reg. Date
Renewal Date
Comments
Add Trademarks
Remove Trademarks
Trade Secrets & Copyrights

FIG. 79

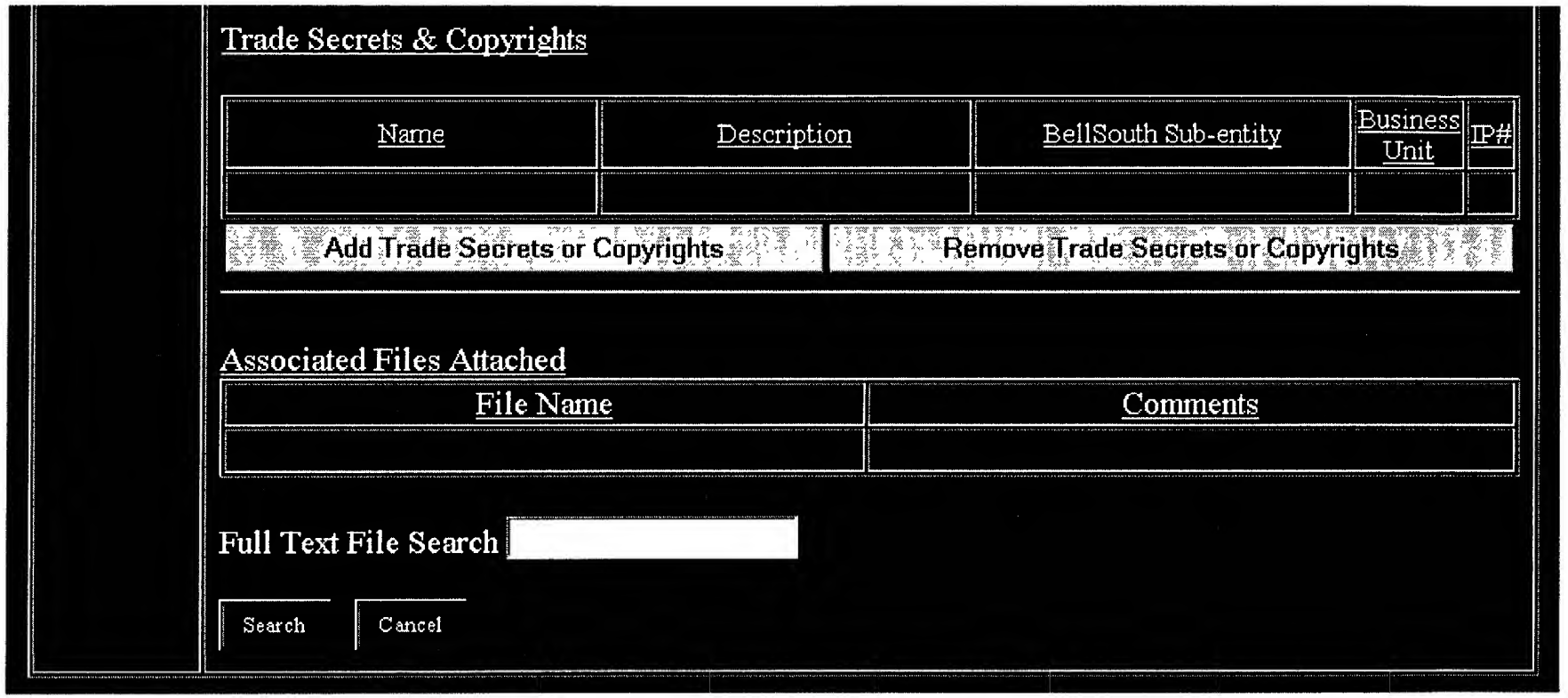

Trade Secrets & Copyrights
Name
Description
BellSouth Sub-entity
Business Unit
IP#
Add Trade Secrets or Copyrights
Remove Trade Secrets or Copyrights
Associated Files Attached
File Name
Comments
Full Text File Search
Search
Cancel

FIG. 80

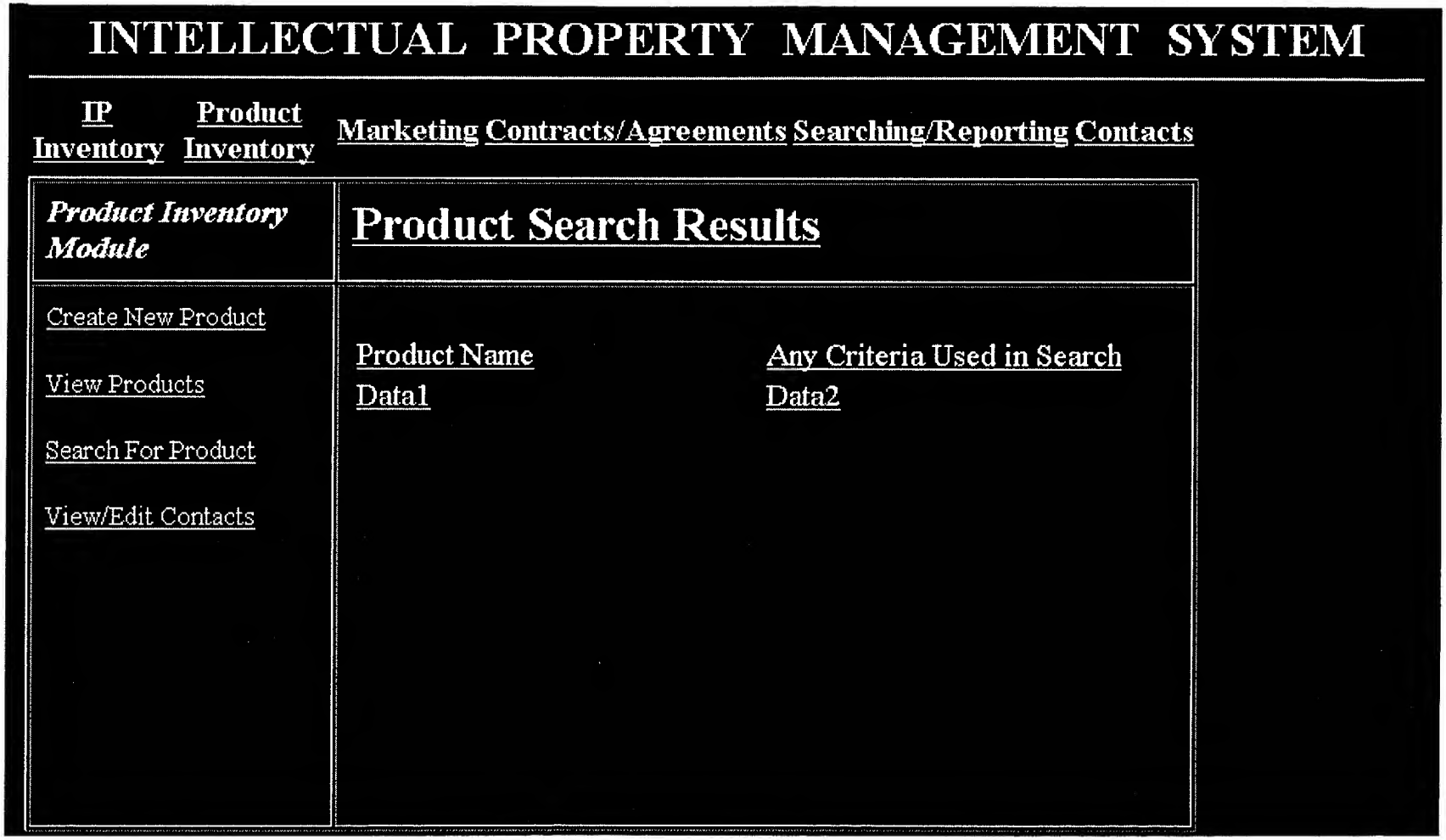

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Product Inventory Module
Product Search Results
Create New Product
View Products
Search For Product
View/Edit Contacts
Product Name
Any Criteria Used in Search
Data1
Data2

FIG. 81

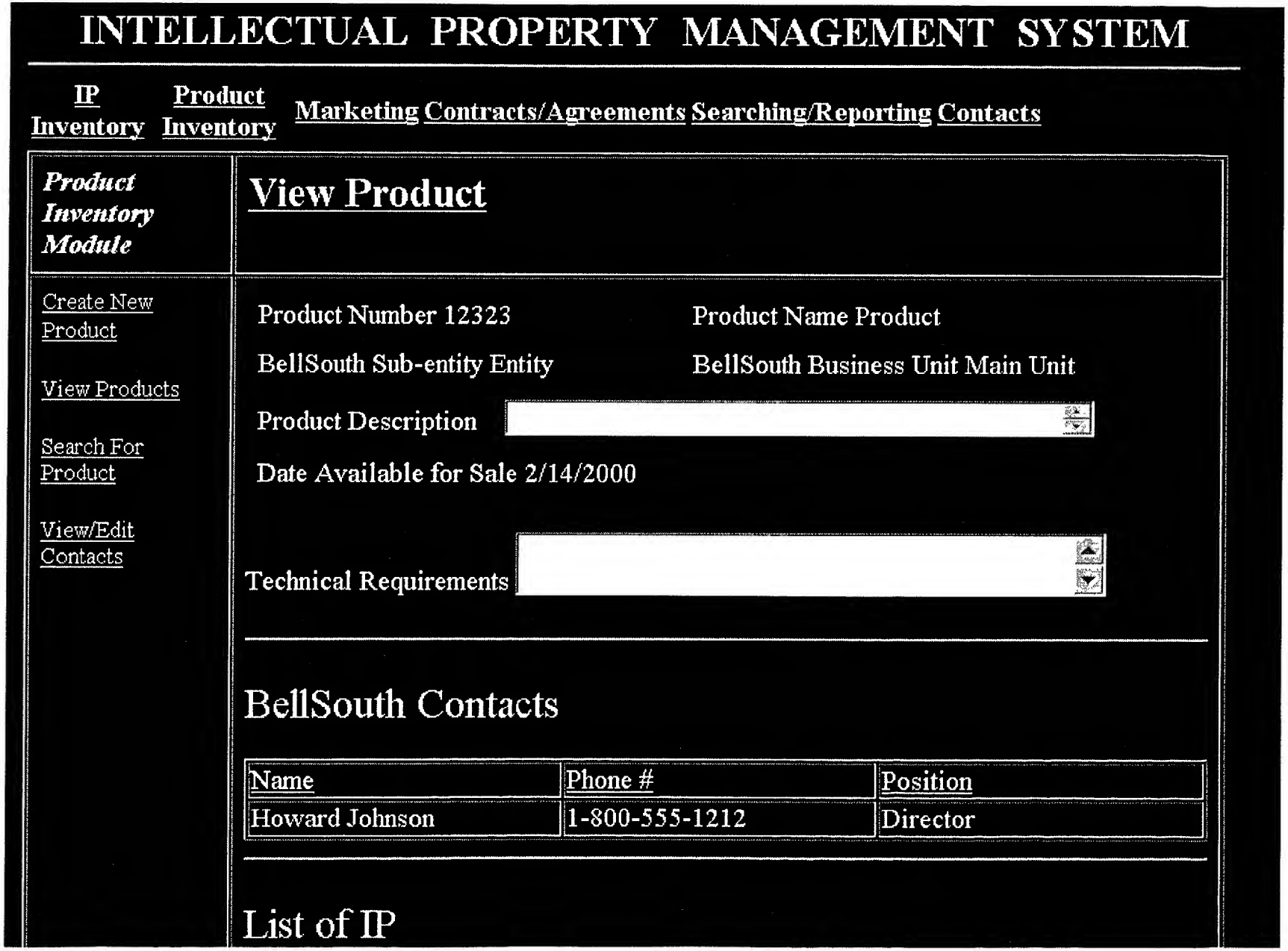

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Product Inventory Module
View Product
Create New Product
View Products
Search For Product
View/Edit Contacts
Product Number 12323
Product Name Product
BellSouth Sub-entity Entity
BellSouth Business Unit Main Unit
Product Description
Date Available for Sale 2/14/2000
Technical Requirements
BellSouth Contacts
Name
Phone #
Position
Howard Johnson
1-800-555-1212
Director
List of IP

FIG. 82

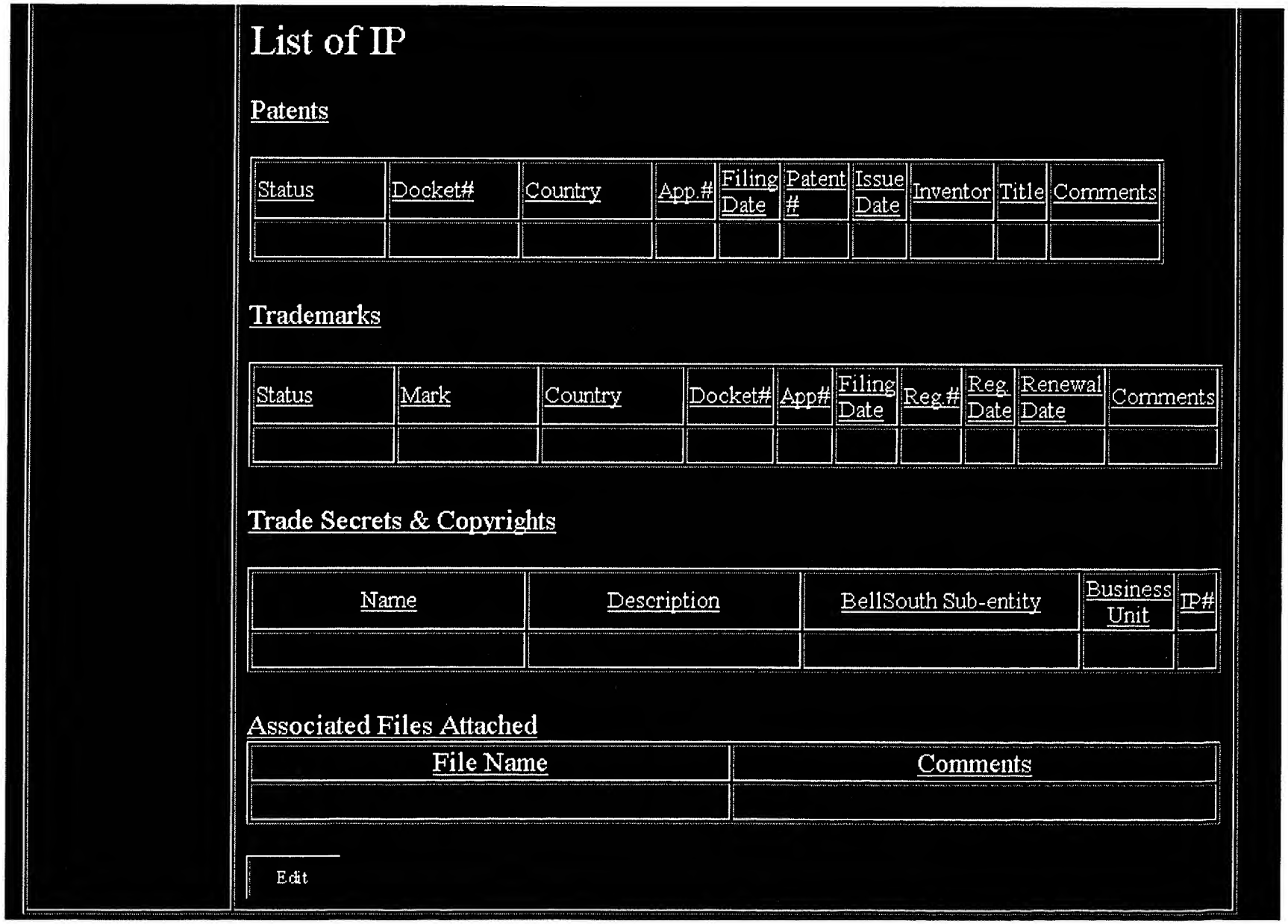

List of IP
Patents
Status
Docket#
Country
App.#
Filing Date
Patent #
Issue Date
Inventor
Title
Comments
Trademarks
Status
Mark
Country
Docket#
App#
Filing Date
Reg.#
Reg. Date
Renewal Date
Comments
Trade Secrets & Copyrights
Name
Description
BellSouth Sub-entity
Business Unit
IP#
Associated Files Attached
File Name
Comments
Edit

FIG. 83

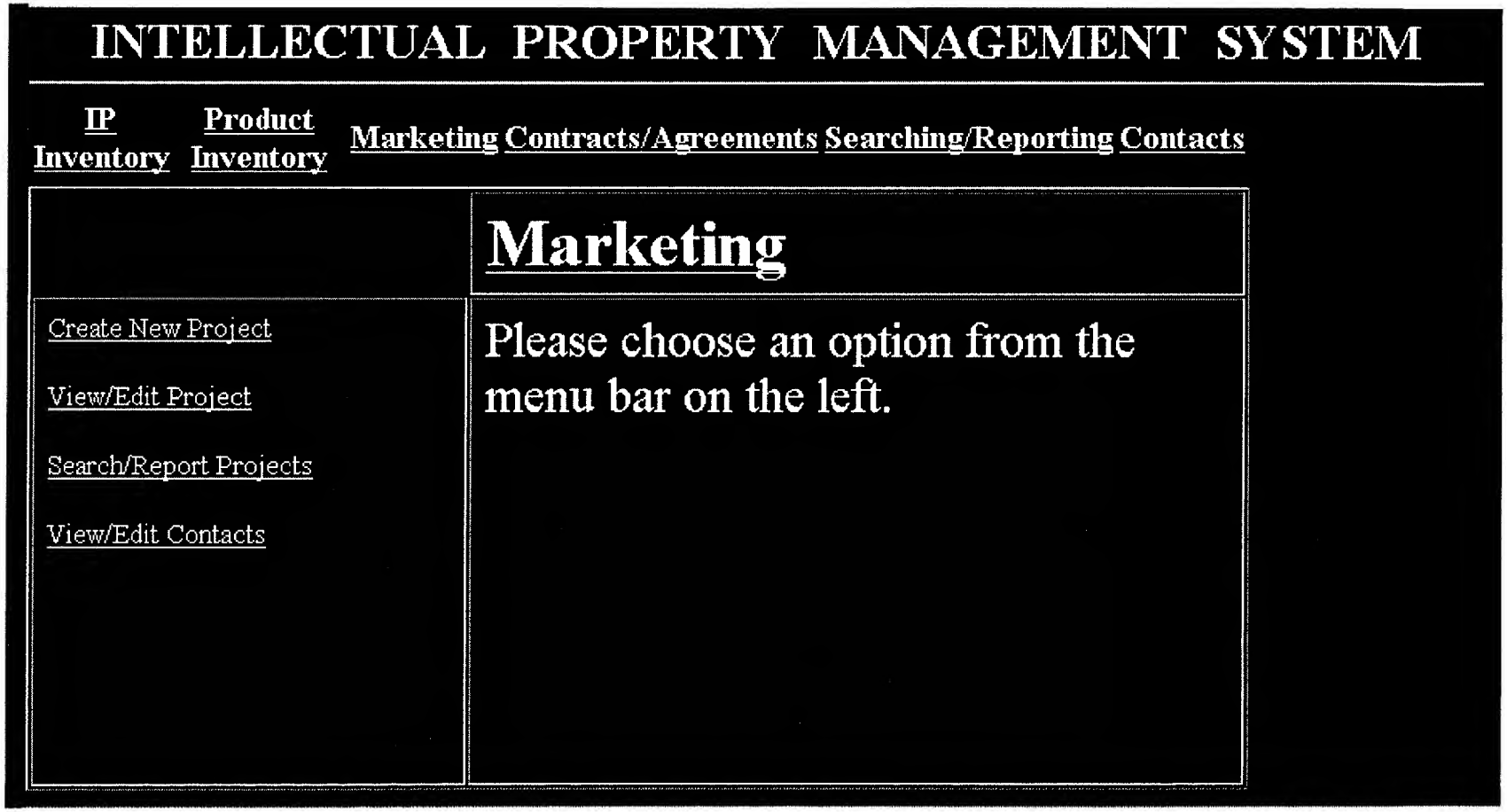

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Marketing
Create New Project
View/Edit Project
Search/Report Projects
View/Edit Contacts
Please choose an option from the menu bar on the left.

FIG. 84

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory | Product Inventory | Marketing | Contracts/Agreements | Searching/Reporting | Contacts

Marketing Module

- Create New Project
- View/Edit Project
- Search/Report Projects
- View/Edit Contacts

Create New Project

Project Name

Project # 121232

Status

Status Date

Deal Value

Deal Size

Include in Top Deals Report

Deal Priority

Description of Project

Follow-up Date

Follow-up Actions

Responsible Party

Products

FIG. 85

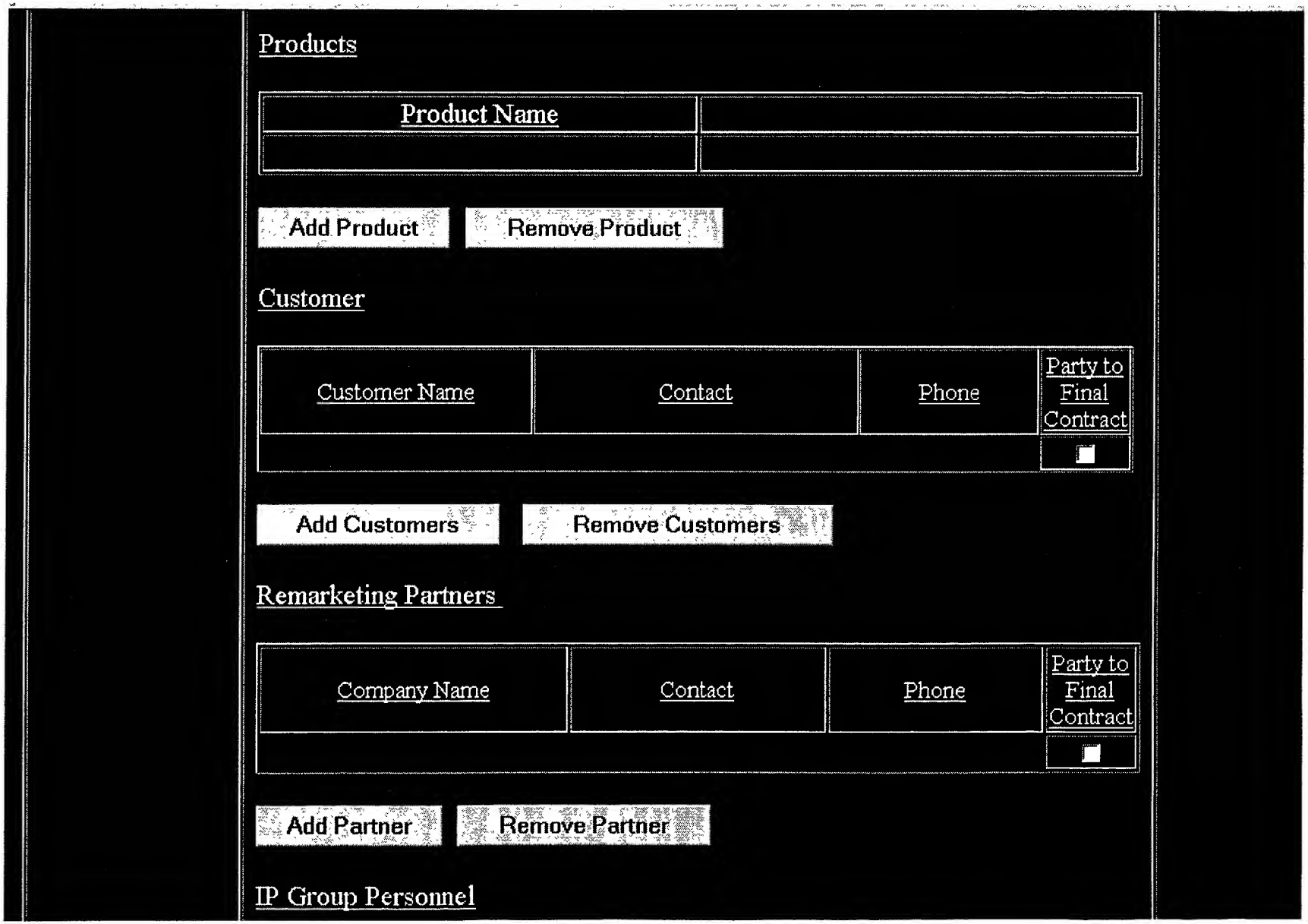

Products
Product Name
Add Product
Remove Product
Customer
Customer Name
Contact
Phone
Party to Final Contract
Add Customers
Remove Customers
Remarketing Partners
Company Name
Contact
Phone
Party to Final Contract
Add Partner
Remove Partner
IP Group Personnel

FIG. 86

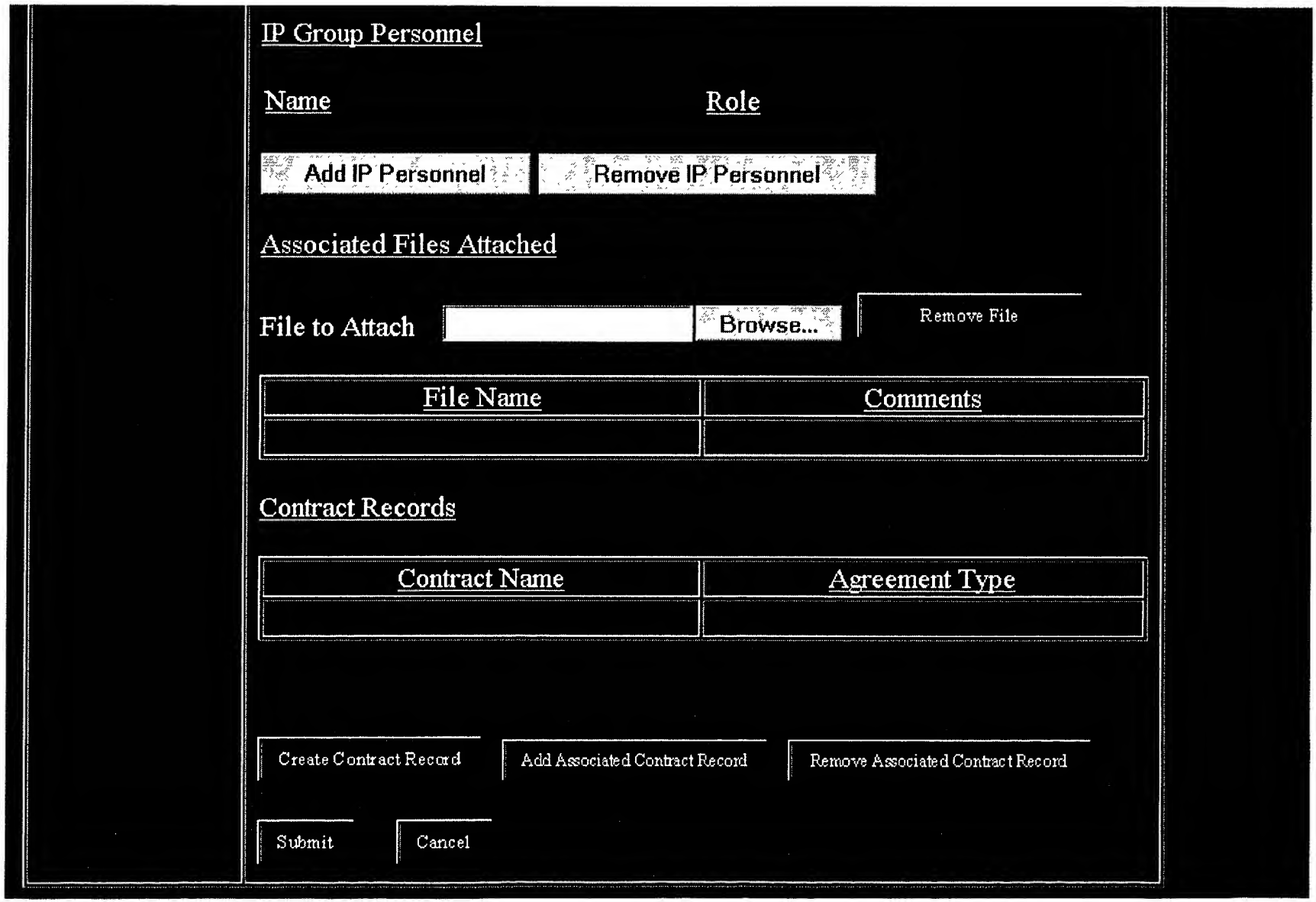

IP Group Personnel
Name
Role
Add IP Personnel
Remove IP Personnel
Associated Files Attached
File to Attach
Browse...
Remove File
File Name
Comments
Contract Records
Contract Name
Agreement Type
Create Contract Record
Add Associated Contract Record
Remove Associated Contract Record
Submit
Cancel

FIG. 87

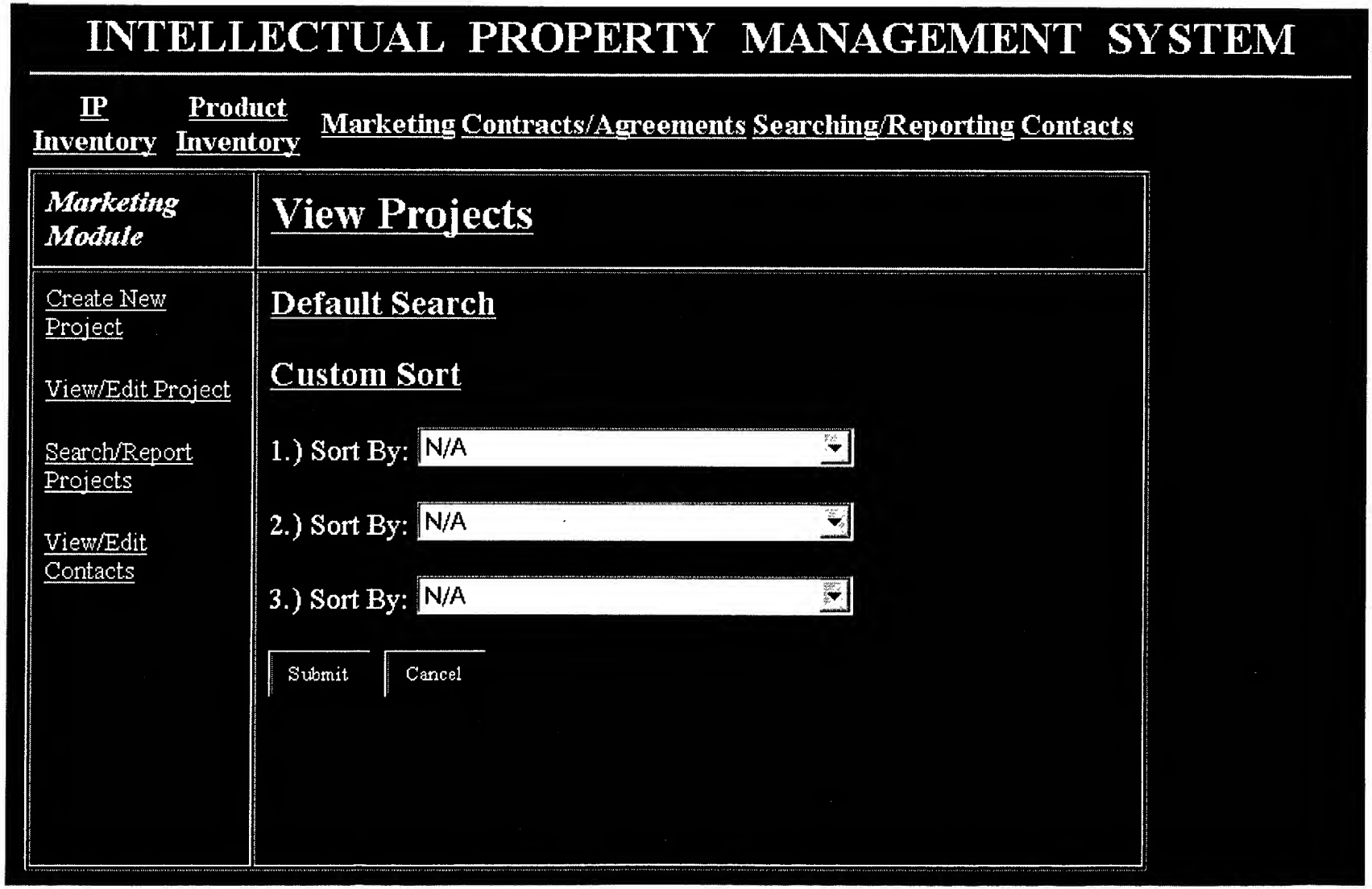

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Marketing Module
View Projects
Create New Project
View/Edit Project
Search/Report Projects
View/Edit Contacts
Default Search
Custom Sort
1.) Sort By: N/A
2.) Sort By: N/A
3.) Sort By: N/A
Submit
Cancel

FIG. 88

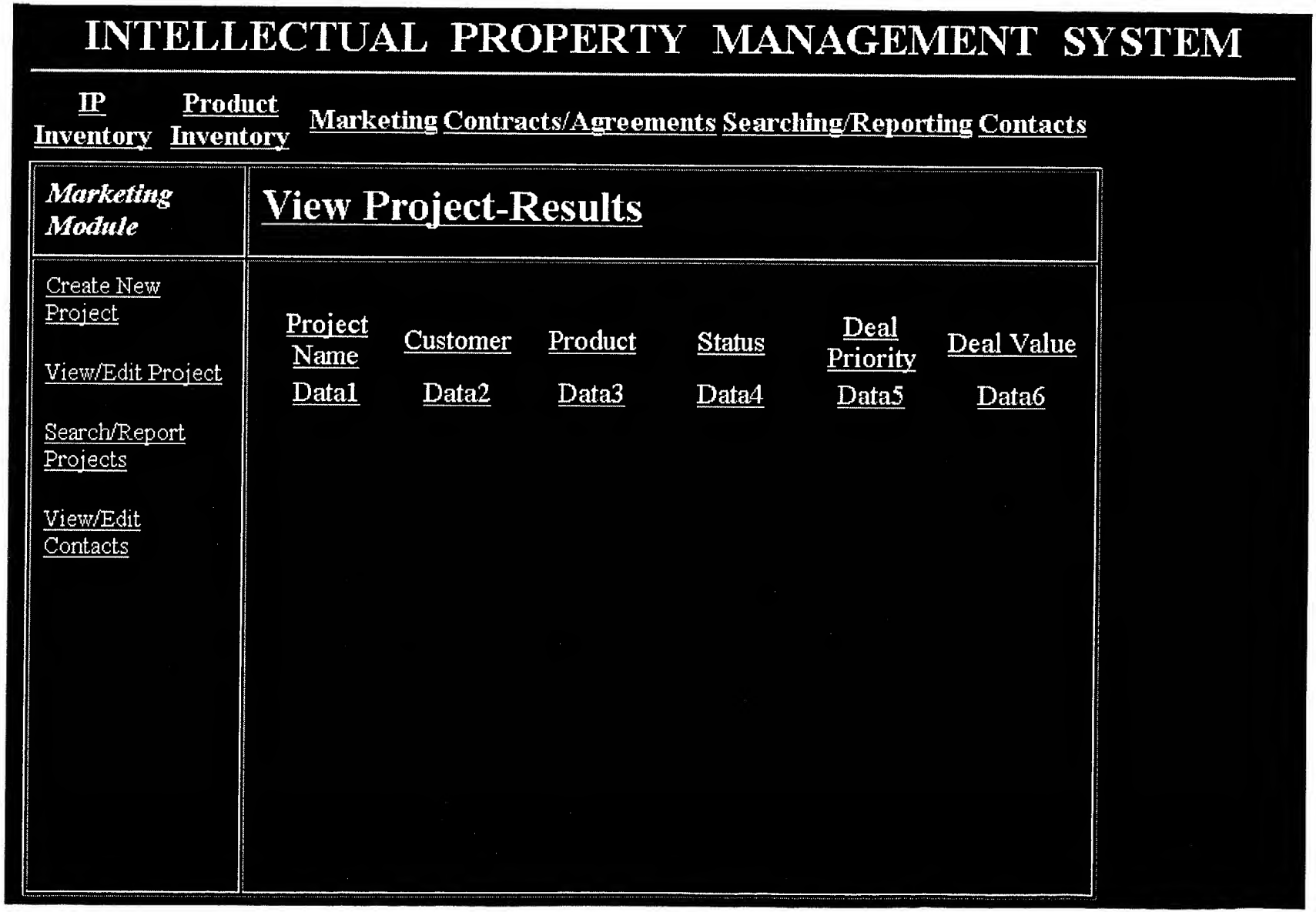

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Marketing Module
View Project-Results
Create New Project
View/Edit Project
Search/Report Projects
View/Edit Contacts
Project Name
Customer
Product
Status
Deal Priority
Deal Value
Data1
Data2
Data3
Data4
Data5
Data6

FIG. 89

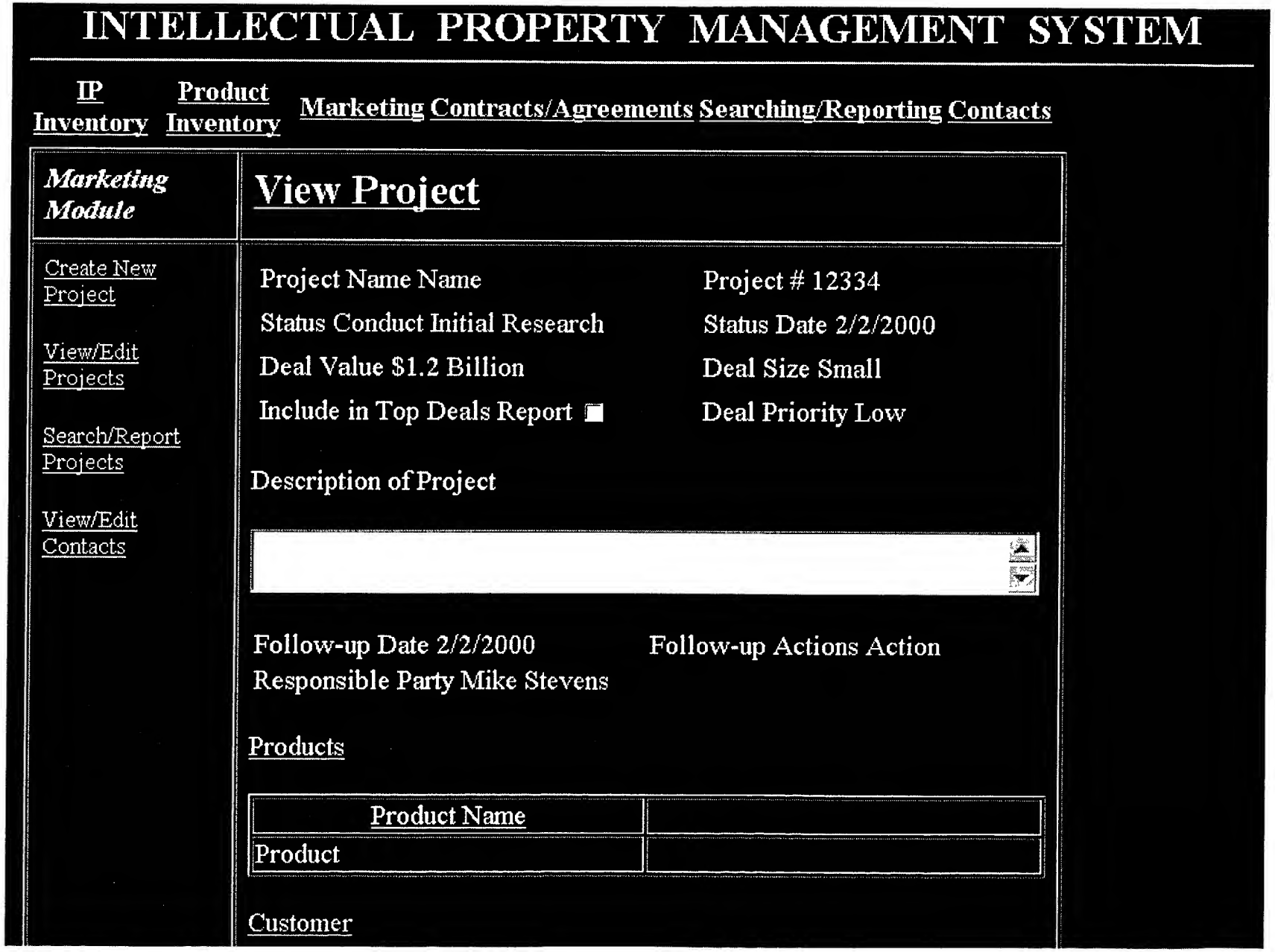

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Marketing Module
View Project
Create New Project
View/Edit Projects
Search/Report Projects
View/Edit Contacts
Project Name Name
Project # 12334
Status Conduct Initial Research
Status Date 2/2/2000
Deal Value $1.2 Billion
Deal Size Small
Include in Top Deals Report
Deal Priority Low
Description of Project
Follow-up Date 2/2/2000
Follow-up Actions Action
Responsible Party Mike Stevens
Products
Product Name
Product
Customer

FIG. 90

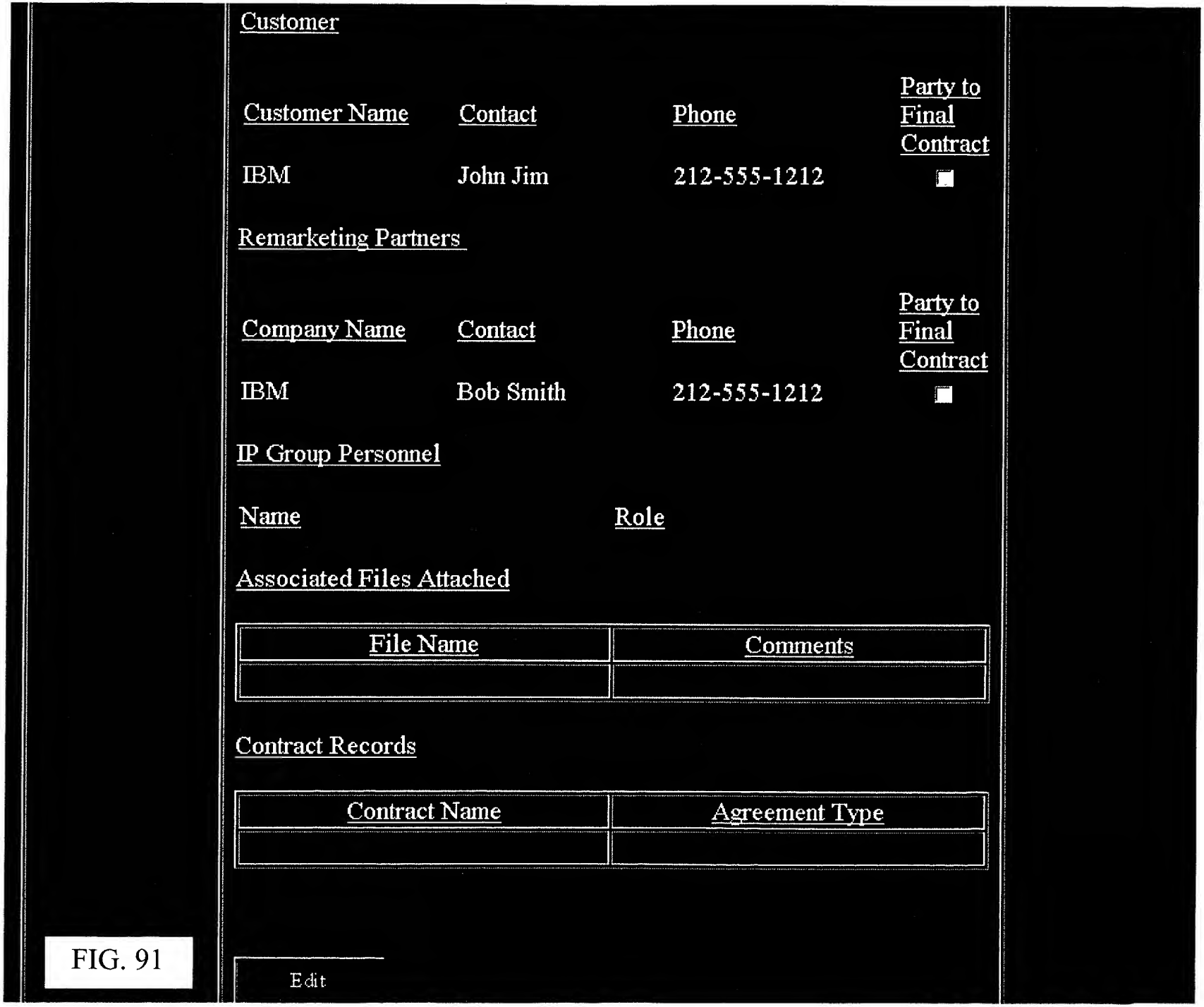

Customer
Customer Name
Contact
Phone
Party to Final Contract
IBM
John Jim
212-555-1212
Remarketing Partners
Company Name
Contact
Phone
Party to Final Contract
IBM
Bob Smith
212-555-1212
IP Group Personnel
Name
Role
Associated Files Attached
File Name
Comments
Contract Records
Contract Name
Agreement Type
Edit

FIG. 91

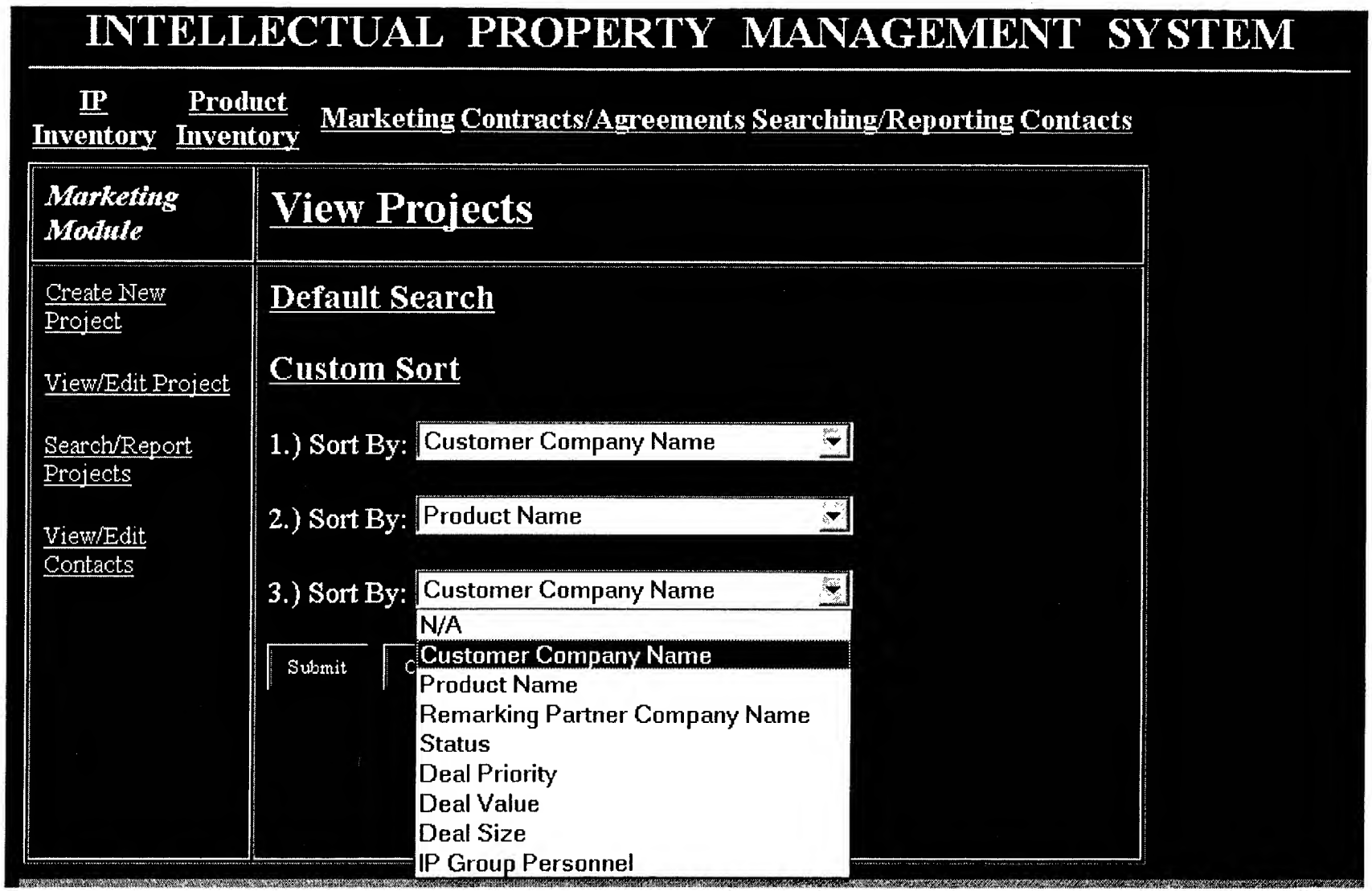

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Marketing Module
View Projects
Create New Project
View/Edit Project
Search/Report Projects
View/Edit Contacts
Default Search
Custom Sort
1.) Sort By: Customer Company Name
2.) Sort By: Product Name
3.) Sort By: Customer Company Name
N/A
Customer Company Name
Product Name
Remarking Partner Company Name
Status
Deal Priority
Deal Value
Deal Size
IP Group Personnel
Submit

FIG. 92

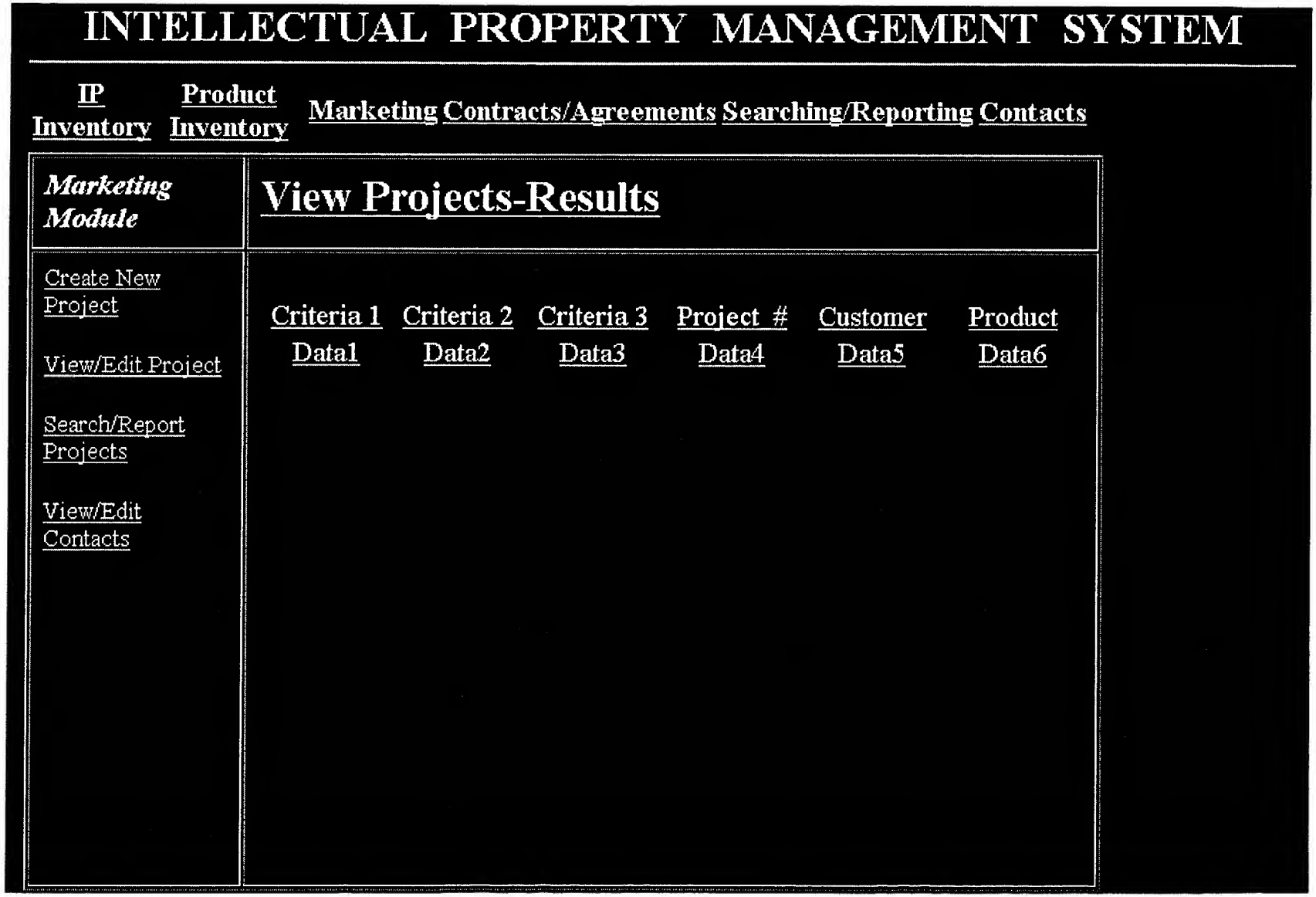

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Marketing Module
View Projects-Results
Create New Project
View/Edit Project
Search/Report Projects
View/Edit Contacts
Criteria 1
Data1
Criteria 2
Data2
Criteria 3
Data3
Project #
Data4
Customer
Data5
Product
Data6

FIG. 93

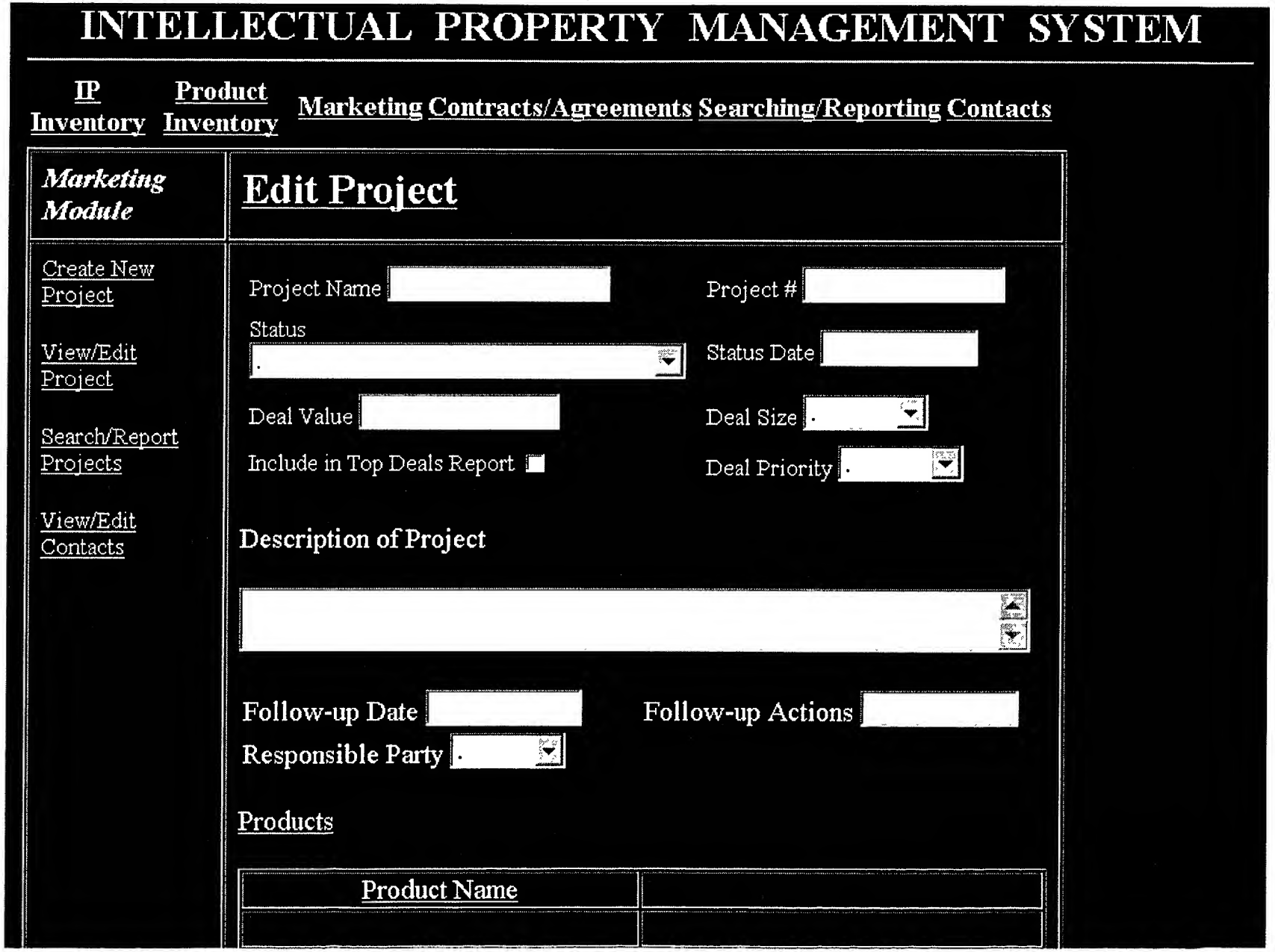

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Marketing Module
Edit Project
Create New Project
View/Edit Project
Search/Report Projects
View/Edit Contacts
Project Name
Project #
Status
Status Date
Deal Value
Deal Size
Include in Top Deals Report
Deal Priority
Description of Project
Follow-up Date
Follow-up Actions
Responsible Party
Products
Product Name

FIG. 94

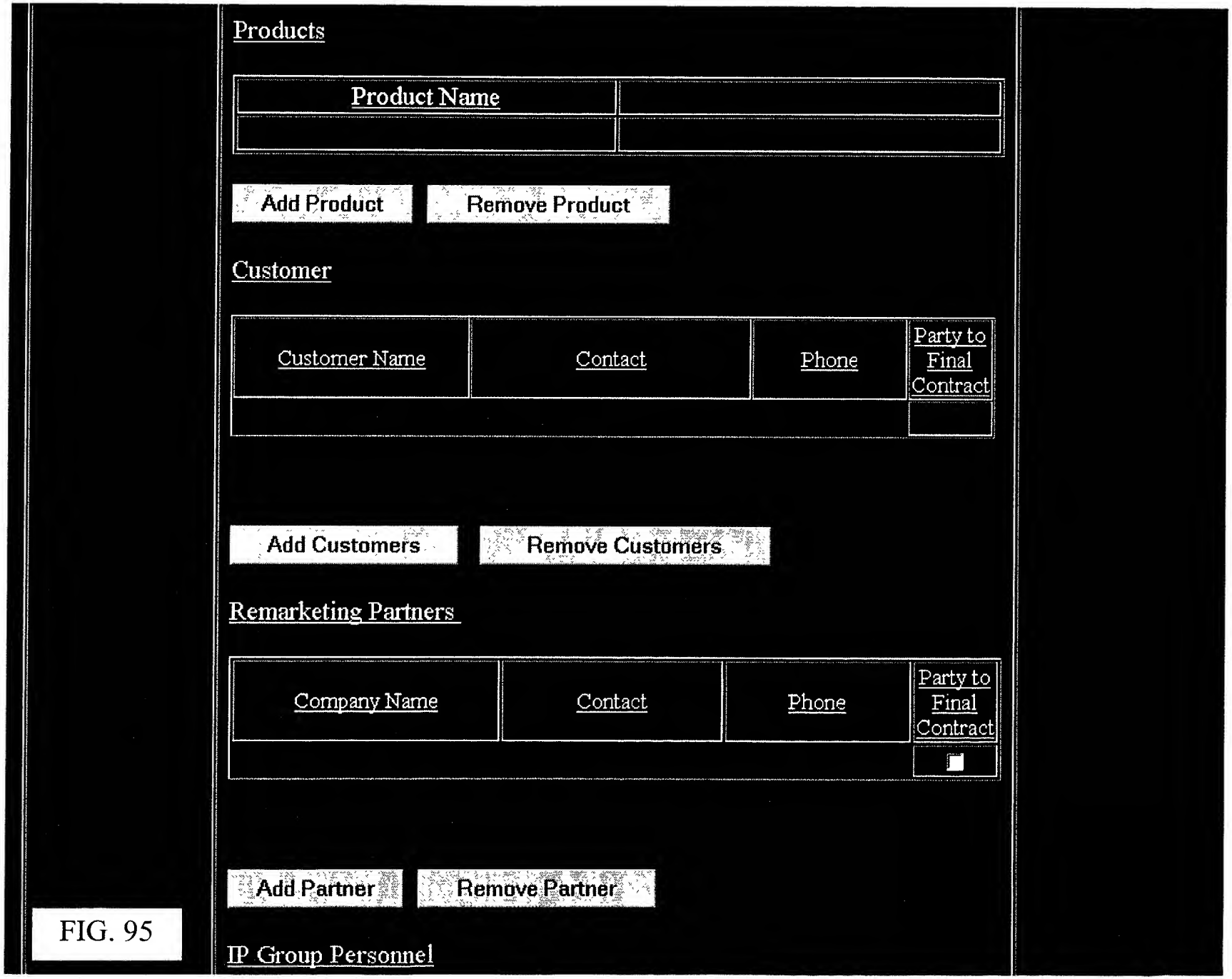

Products
Product Name
Add Product
Remove Product
Customer
Customer Name
Contact
Phone
Party to Final Contract
Add Customers
Remove Customers
Remarketing Partners
Company Name
Contact
Phone
Party to Final Contract
Add Partner
Remove Partner
IP Group Personnel

FIG. 95

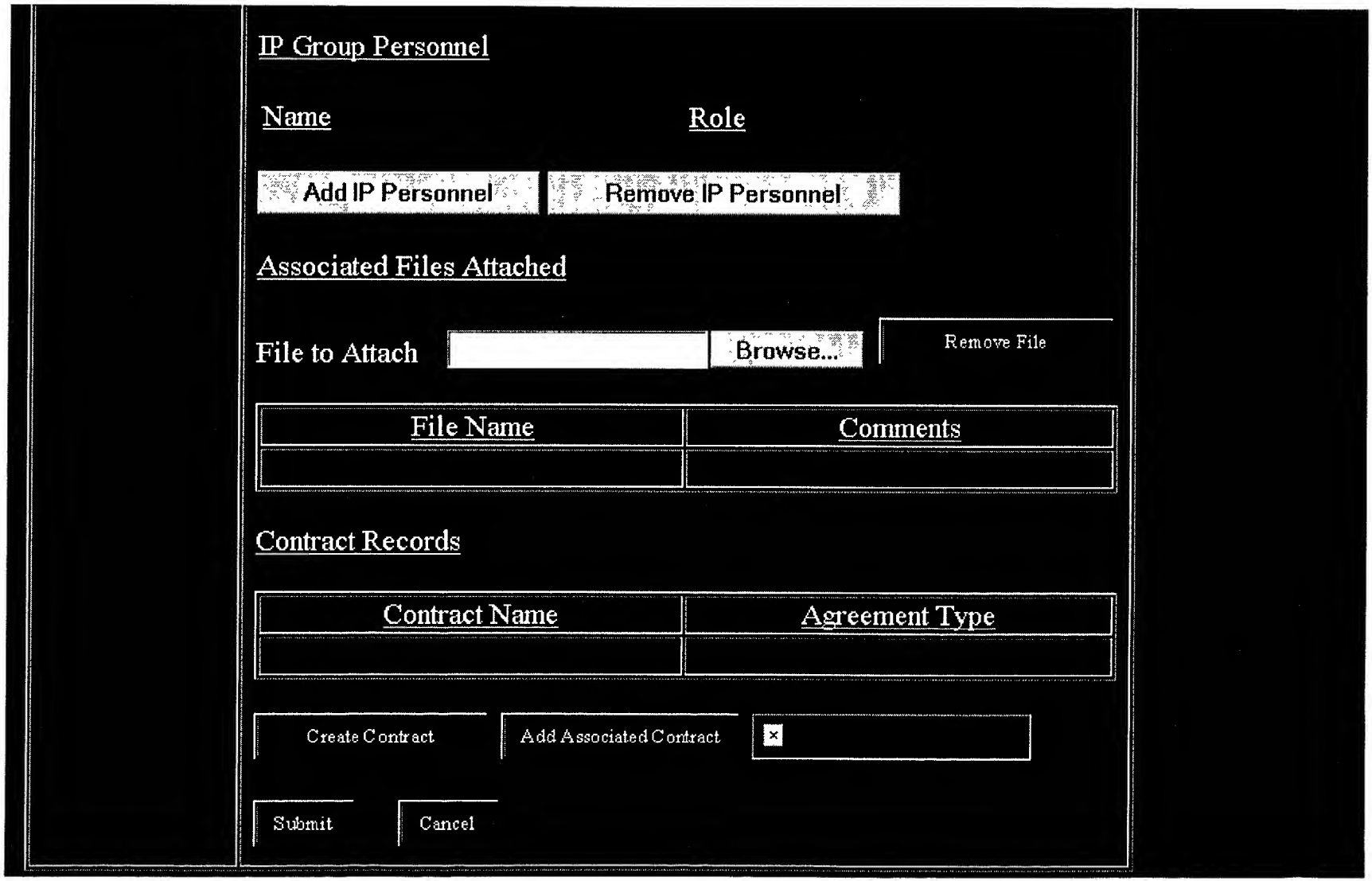

IP Group Personnel
Name
Role
Add IP Personnel
Remove IP Personnel
Associated Files Attached
File to Attach
Browse...
Remove File
File Name
Comments
Contract Records
Contract Name
Agreement Type
Create Contract
Add Associated Contract
Submit
Cancel

FIG. 96

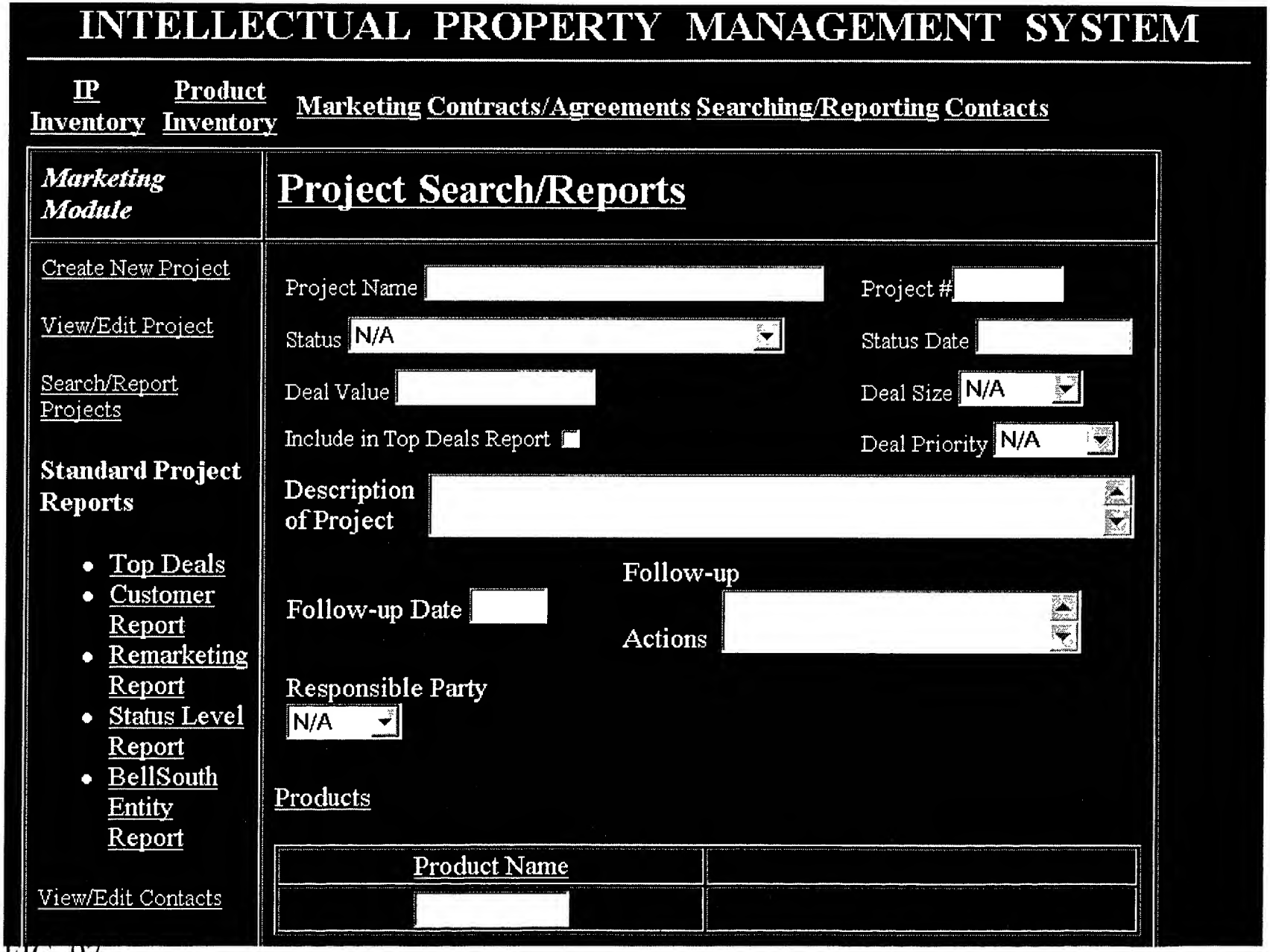

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Marketing Module
Project Search/Reports
Create New Project
View/Edit Project
Search/Report Projects
Standard Project Reports
Top Deals
Customer Report
Remarketing Report
Status Level Report
BellSouth Entity Report
View/Edit Contacts
Project Name
Project #
Status
N/A
Status Date
Deal Value
Deal Size
N/A
Include in Top Deals Report
Deal Priority
N/A
Description of Project
Follow-up Date
Follow-up Actions
Responsible Party
N/A
Products
Product Name

FIG. 97

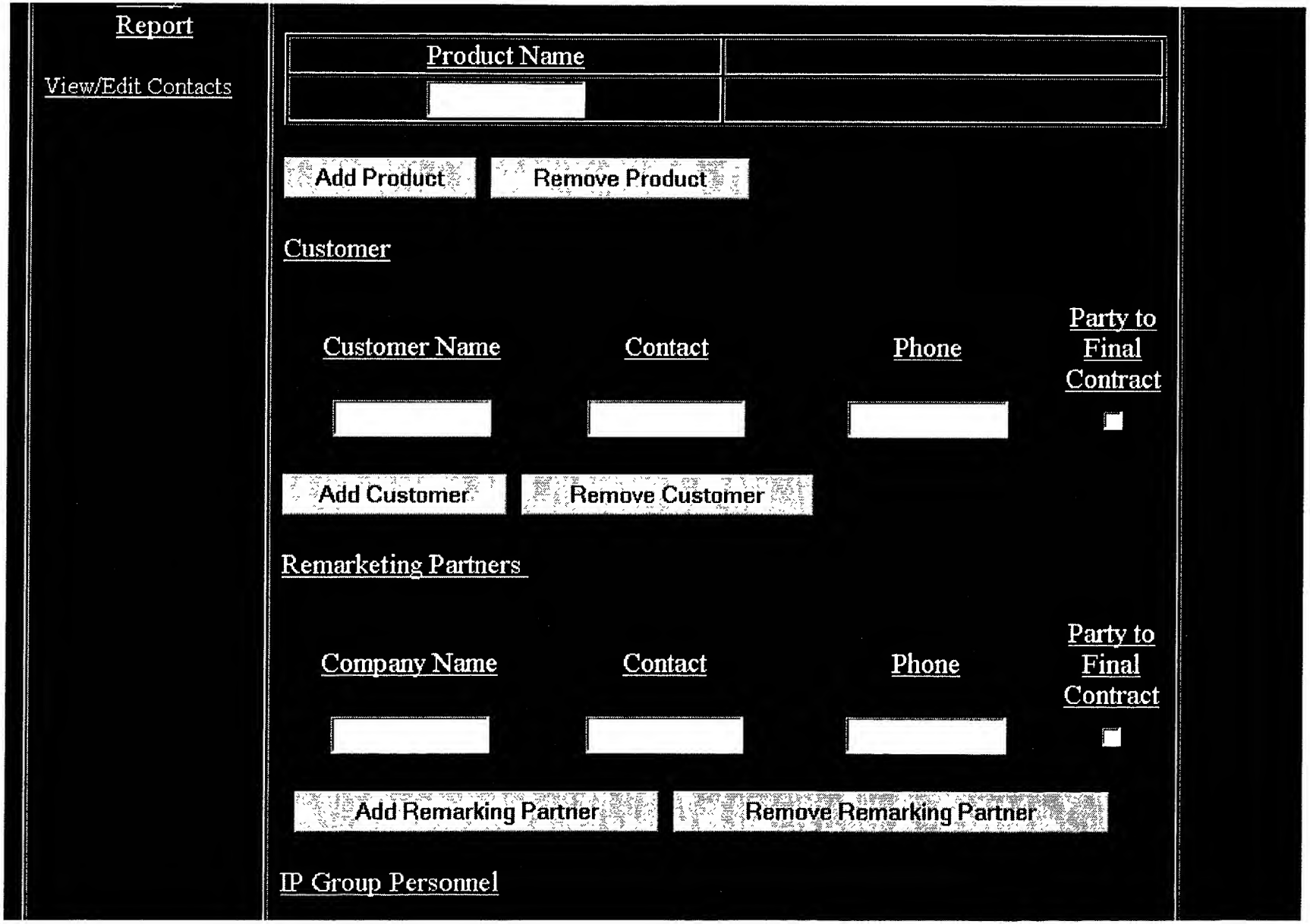

Report
View/Edit Contacts
Product Name
Add Product
Remove Product
Customer
Customer Name
Contact
Phone
Party to Final Contract
Add Customer
Remove Customer
Remarketing Partners
Company Name
Contact
Phone
Party to Final Contract
Add Remarking Partner
Remove Remarking Partner
IP Group Personnel

FIG. 98

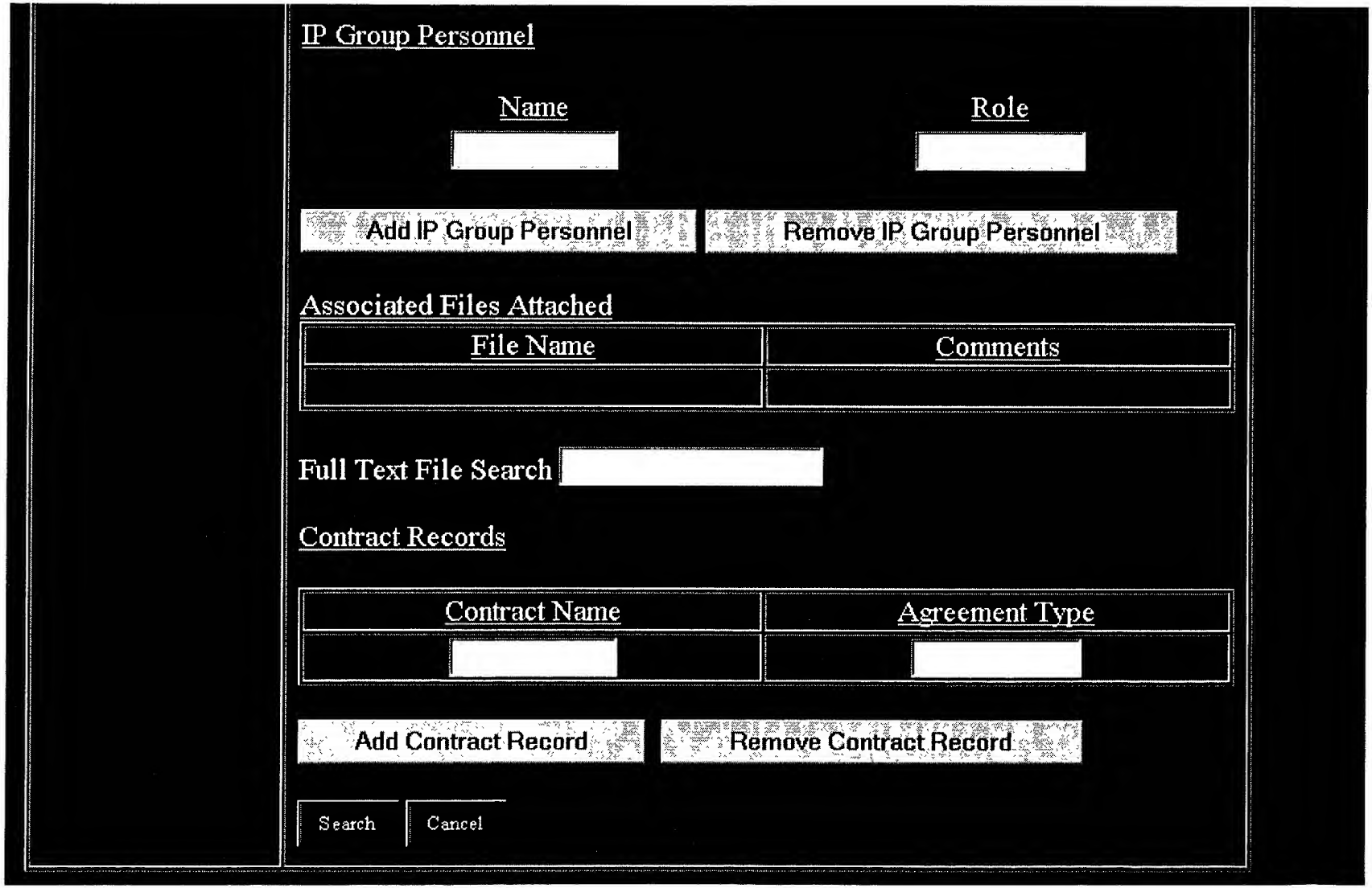

IP Group Personnel
Name
Role
Add IP Group Personnel
Remove IP Group Personnel
Associated Files Attached
File Name
Comments
Full Text File Search
Contract Records
Contract Name
Agreement Type
Add Contract Record
Remove Contract Record
Search
Cancel

FIG. 99

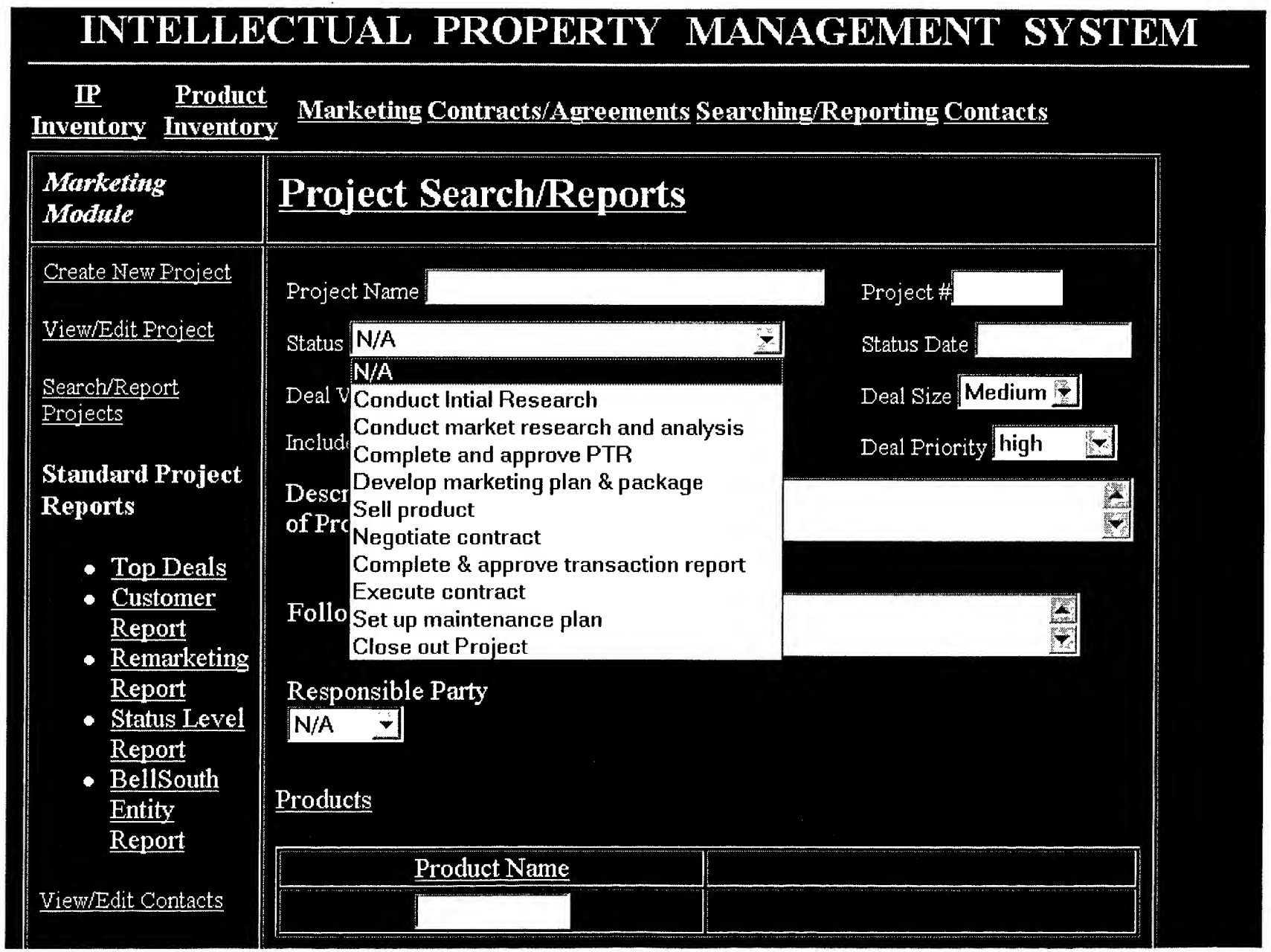

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Marketing Module
Project Search/Reports
Create New Project
View/Edit Project
Search/Report Projects
Standard Project Reports
Top Deals
Customer Report
Remarketing Report
Status Level Report
BellSouth Entity Report
View/Edit Contacts
Project Name
Project #
Status
N/A
Status Date
Deal V
Deal Size
Medium
Includ
Deal Priority
high
Descr
of Pro
Follo
N/A
Conduct Intial Research
Conduct market research and analysis
Complete and approve PTR
Develop marketing plan & package
Sell product
Negotiate contract
Complete & approve transaction report
Execute contract
Set up maintenance plan
Close out Project
Responsible Party
N/A
Products
Product Name

FIG. 100

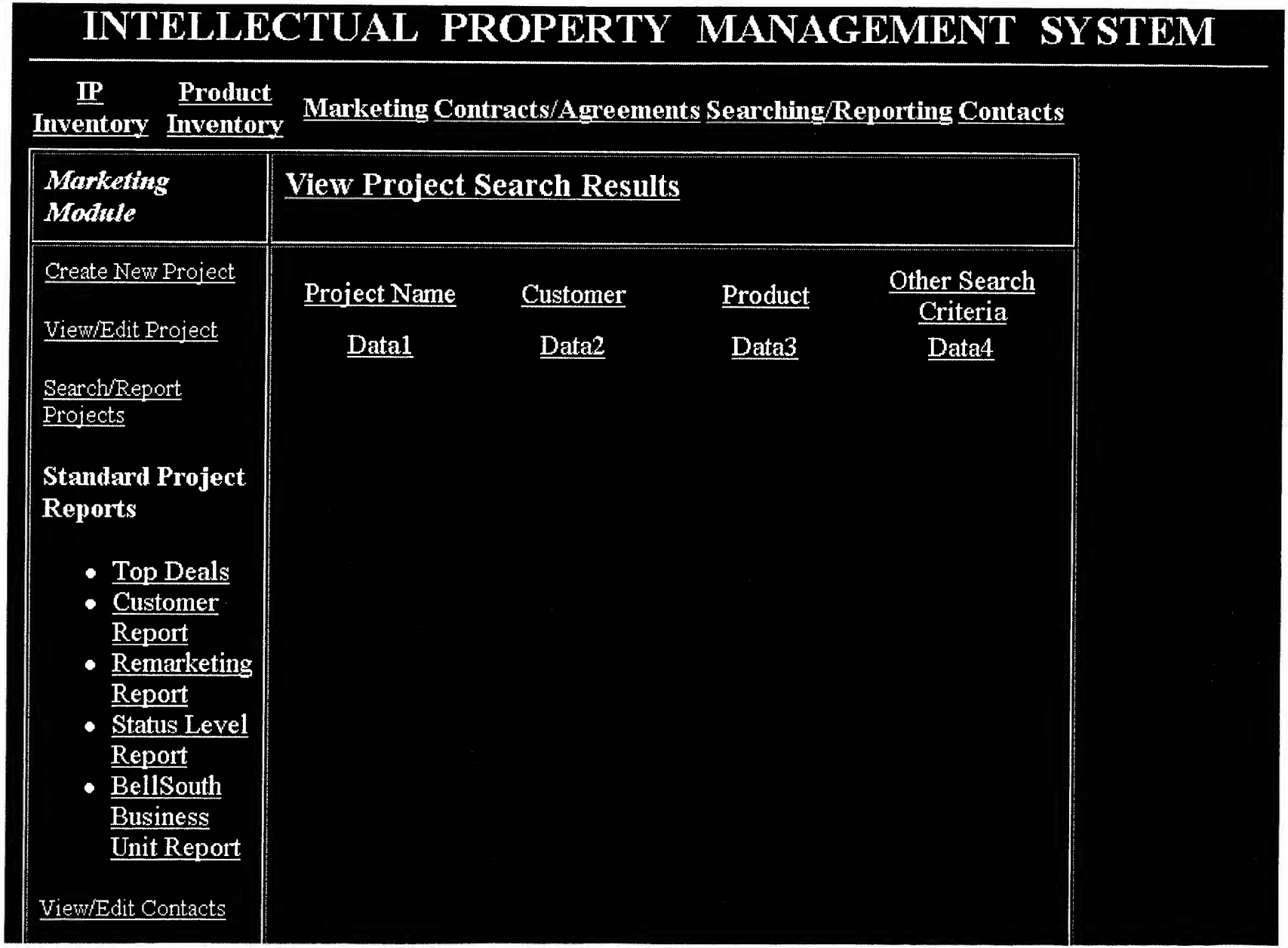

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Marketing Module
View Project Search Results
Create New Project
View/Edit Project
Search/Report Projects
Standard Project Reports
Top Deals
Customer Report
Remarketing Report
Status Level Report
BellSouth Business Unit Report
View/Edit Contacts
Project Name
Customer
Product
Other Search Criteria
Data1
Data2
Data3
Data4

FIG. 101

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory | Product Inventory | Marketing | Contracts/Agreements | Searching/Reporting | Contacts

Marketing Module

Top Deals Report

Create New Project

View/Edit Project

Search/Report Projects

Standard Project Reports

- Top Deals
- Customer Report
- Remarketing Report
- Status Level Report
- BellSouth Business Unit

View/Edit Contacts

Status	Product/Project Name	Opp.#	BellSouth BU	Patent Status	Company Name	Lead	Support	Est. Value	Deal Size	Priority
Data1	Data2	Data3	Data4	Data5	Data6	Data7	Data8	Data9	Data10	Data11

FIG. 102

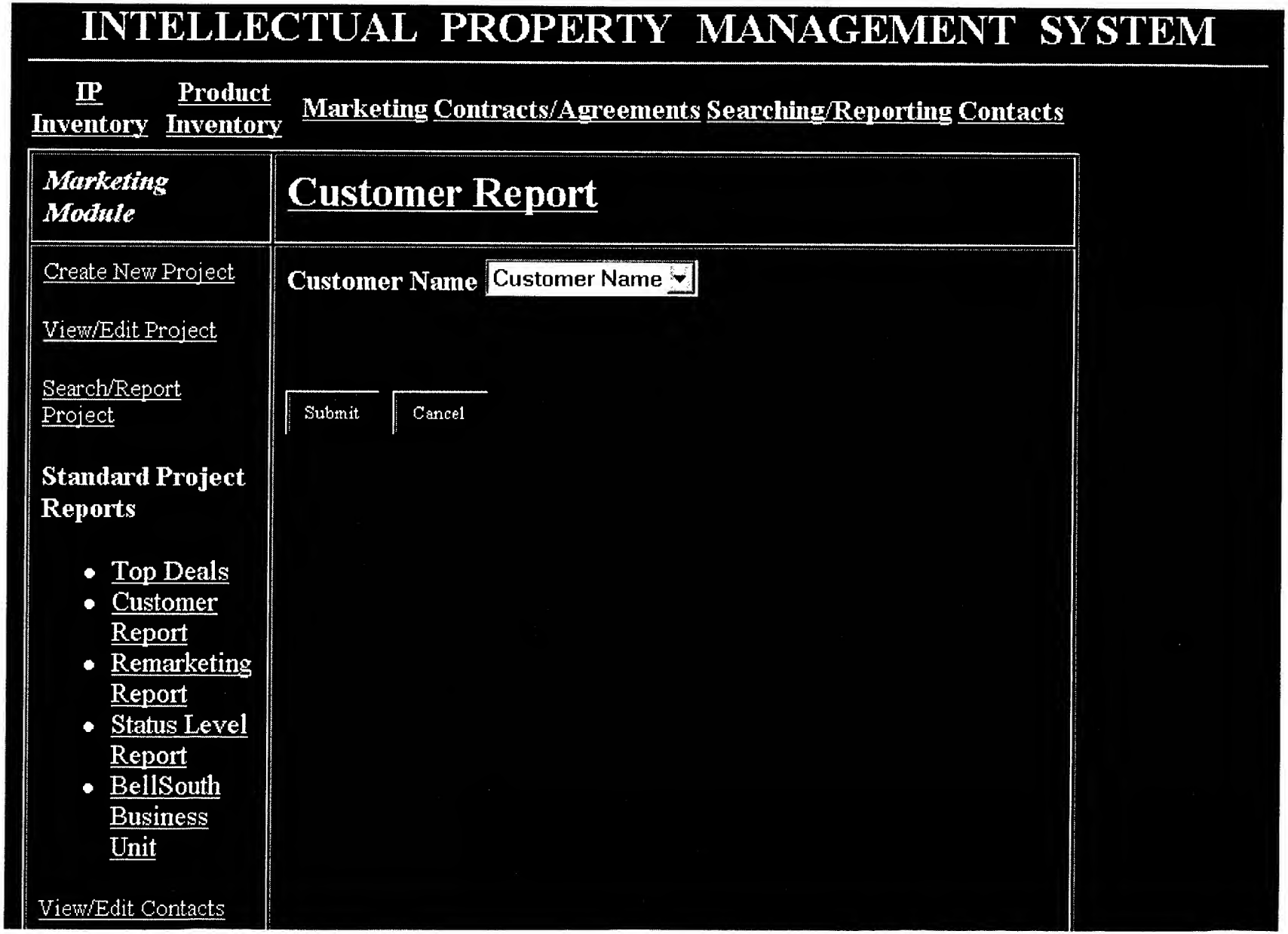

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Marketing Module
Customer Report
Create New Project
View/Edit Project
Search/Report Project
Standard Project Reports
Top Deals
Customer Report
Remarketing Report
Status Level Report
BellSouth Business Unit
View/Edit Contacts
Customer Name
Customer Name
Submit
Cancel

FIG. 103

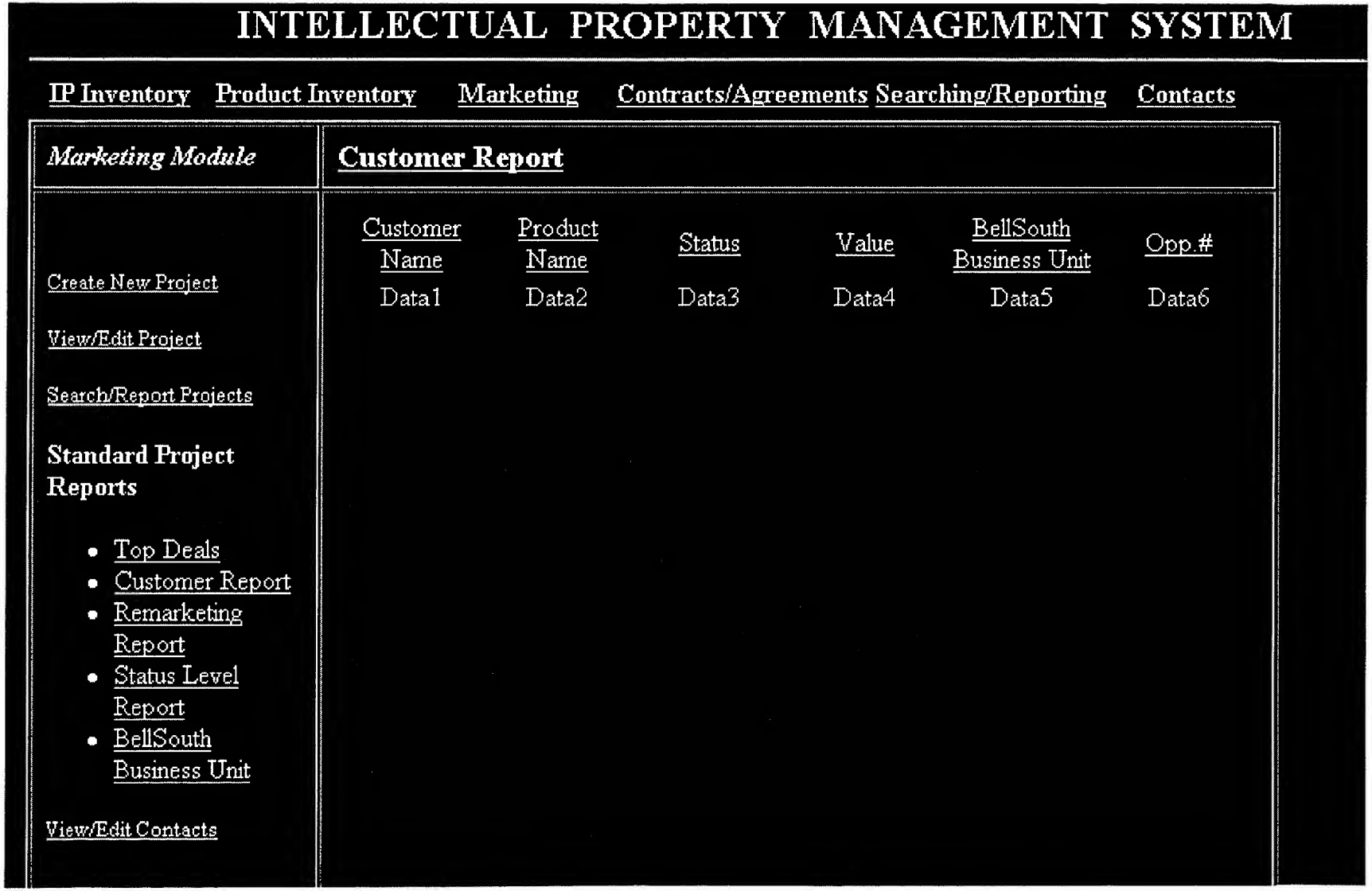

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Marketing Module
Customer Report
Create New Project
View/Edit Project
Search/Report Projects
Standard Project Reports
Top Deals
Customer Report
Remarketing Report
Status Level Report
BellSouth Business Unit
View/Edit Contacts
Customer Name
Product Name
Status
Value
BellSouth Business Unit
Opp.#
Data1
Data2
Data3
Data4
Data5
Data6

FIG. 103A

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Marketing Module
Remarketing Partner Report
Create New Project
View/Edit Project
Search/Report Projects
Standard Project Reports
Top Deals
Customer Report
Remarketing Report
Status Level Report
BellSouth Business Unit
View/Edit Contacts
Remarking Company Name
Company Name
Submit
Cancel

FIG. 104

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory | Product Inventory | Marketing | Contracts/Agreements | Searching/Reporting | Contacts

Marketing Module

Remarketing Partner Report

Create New Project

View/Edit Project

Search/Report Projects

Standard Project Reports

- Top Deals
- Customer Report
- Remarketing Report
- Status Level Report
- BellSouth Business Unit

View/Edit Contacts

Remarketing Partner	Product Name	Status	Value	BellSouth Business Unit	Opp.#
Data1	Data2	Data3	Data4	Data5	Data6

FIG. 105

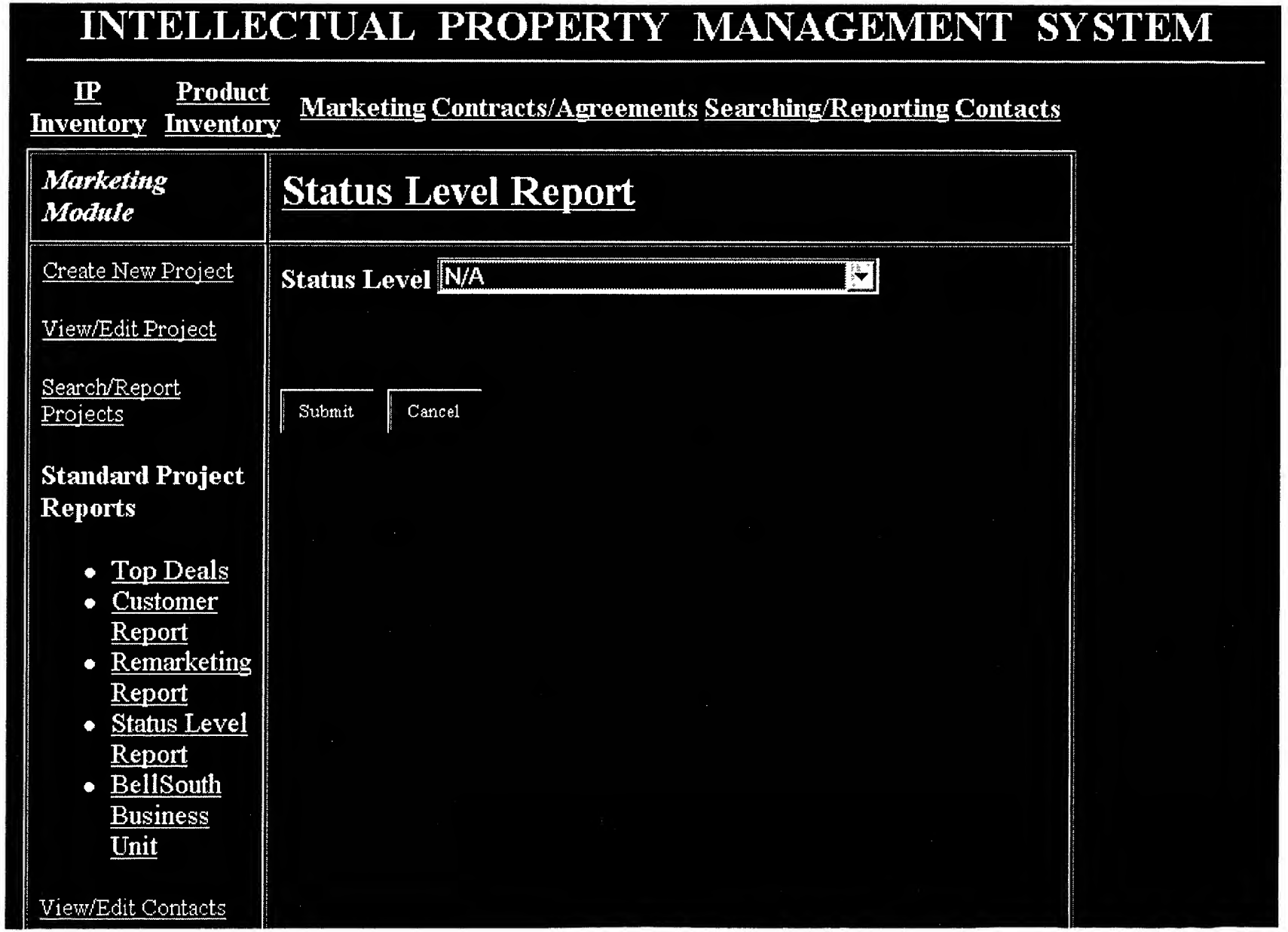

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Marketing Module
Status Level Report
Create New Project
View/Edit Project
Search/Report Projects
Standard Project Reports
Top Deals
Customer Report
Remarketing Report
Status Level Report
BellSouth Business Unit
View/Edit Contacts
Status Level
N/A
Submit
Cancel

FIG. 106

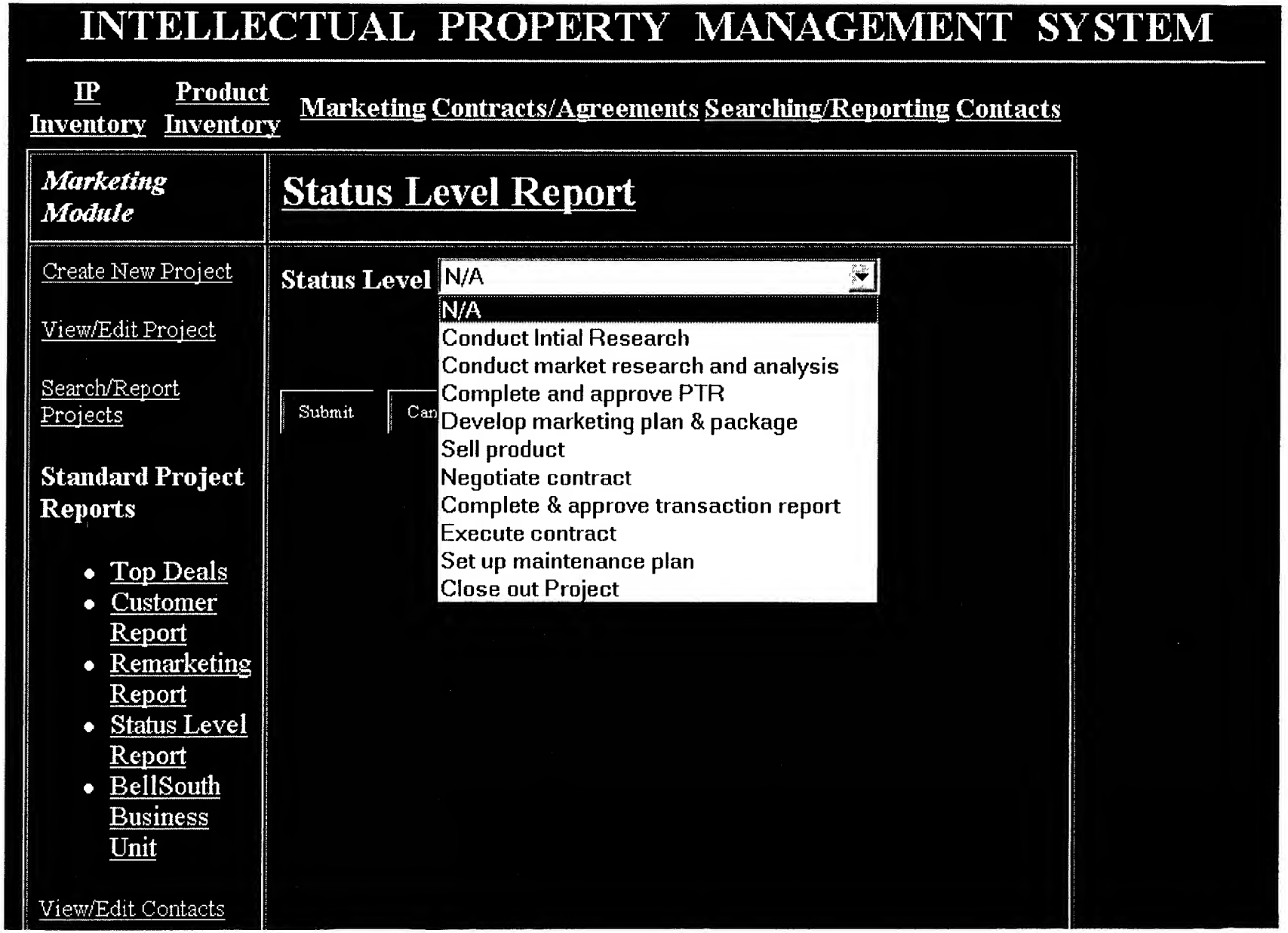

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Marketing Module
Status Level Report
Create New Project
View/Edit Project
Search/Report Projects
Standard Project Reports
Top Deals
Customer Report
Remarketing Report
Status Level Report
BellSouth Business Unit
View/Edit Contacts
Status Level
N/A
N/A
Conduct Intial Research
Conduct market research and analysis
Complete and approve PTR
Develop marketing plan & package
Sell product
Negotiate contract
Complete & approve transaction report
Execute contract
Set up maintenance plan
Close out Project
Submit
Can

FIG. 107

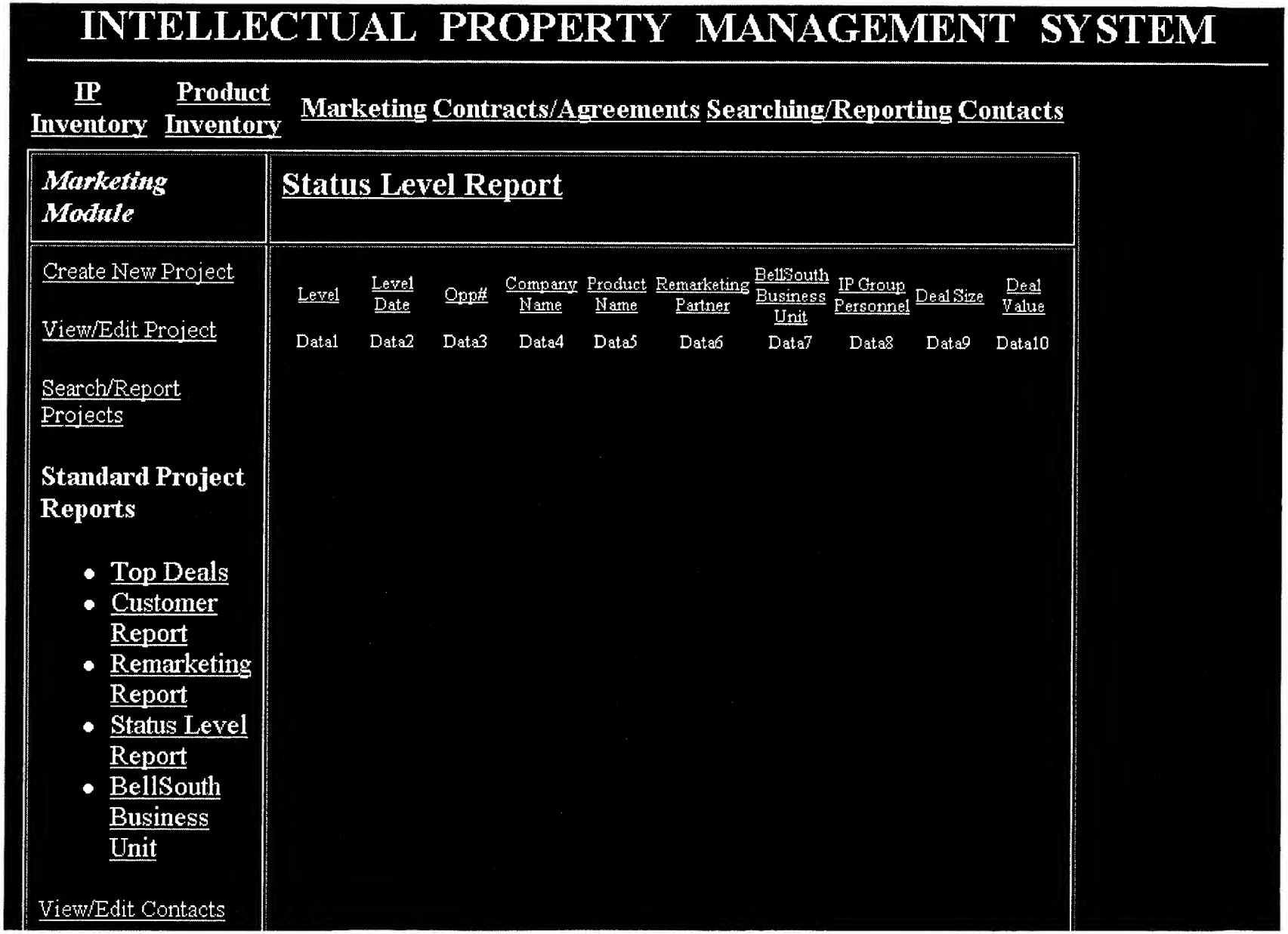

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Marketing Module
Status Level Report
Create New Project
View/Edit Project
Search/Report Projects
Standard Project Reports
Top Deals
Customer Report
Remarketing Report
Status Level Report
BellSouth Business Unit
View/Edit Contacts
Level
Level Date
Opp#
Company Name
Product Name
Remarketing Partner
BellSouth Business Unit
IP Group Personnel
Deal Size
Deal Value
Data1
Data2
Data3
Data4
Data5
Data6
Data7
Data8
Data9
Data10

FIG. 108

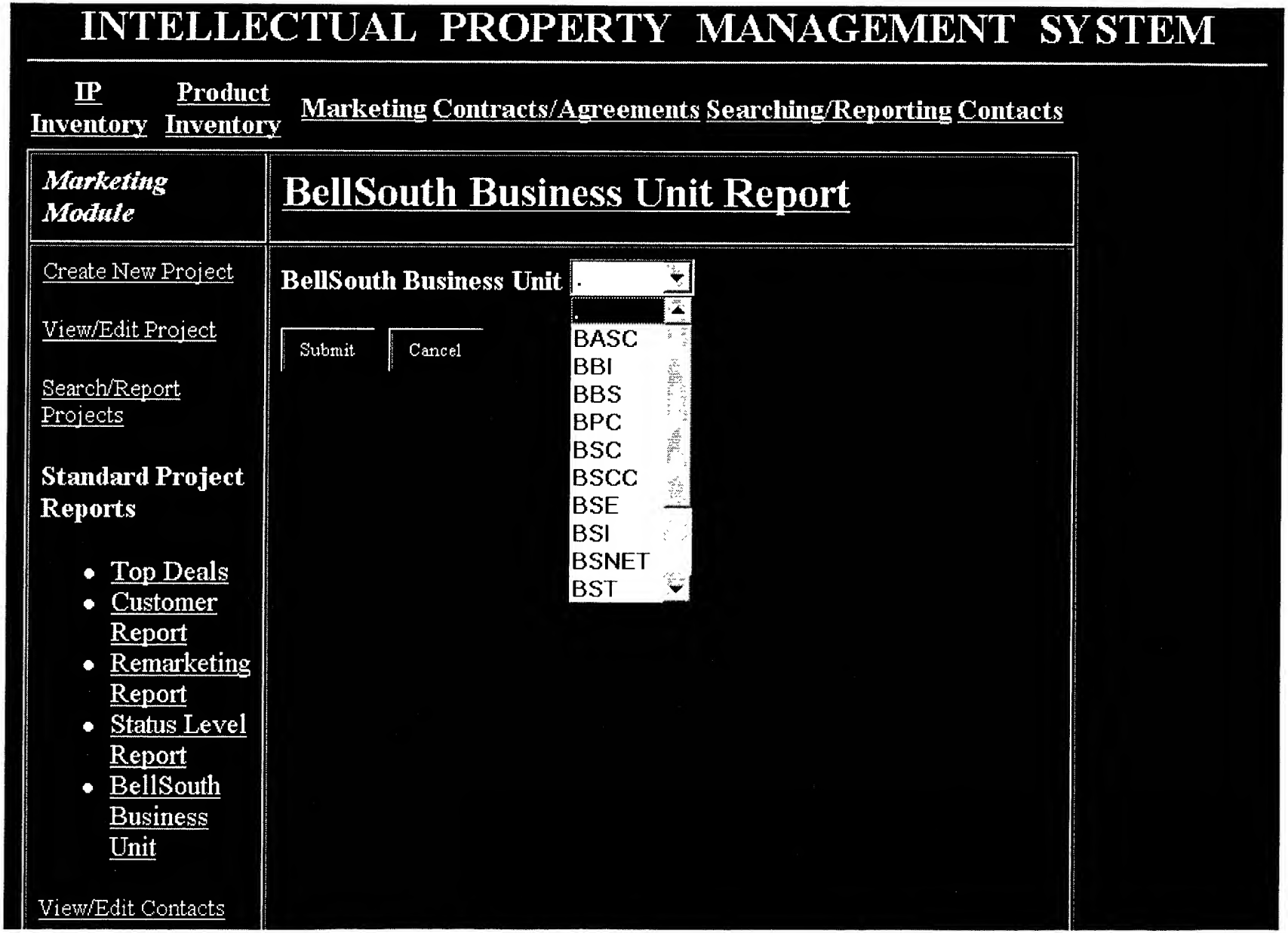

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Marketing Module
BellSouth Business Unit Report
Create New Project
View/Edit Project
Search/Report Projects
Standard Project Reports
Top Deals
Customer Report
Remarketing Report
Status Level Report
BellSouth Business Unit
View/Edit Contacts
BellSouth Business Unit
Submit
Cancel
BASC
BBI
BBS
BPC
BSC
BSCC
BSE
BSI
BSNET
BST

FIG. 109

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory | Product Inventory | Marketing | Contracts/Agreements | Searching/Reporting | Contacts

Marketing Module

Bell South Business Unit Report

Create New Project

View/Edit Project

Search/Report Projects

Standard Project Reports

- Top Deals
- Customer Report
- Remarketing Report
- Status Level Report
- BellSouth Business Unit

View/Edit Contacts

Entity Name	Status	Product Name	Customer Name	Remarketing Partner	Deal Value	BellSouth Contacts	BIPMARK Contact
Data1	Data2	Data3	Data4	Data5	Data6	Data7	Data8

FIG. 110

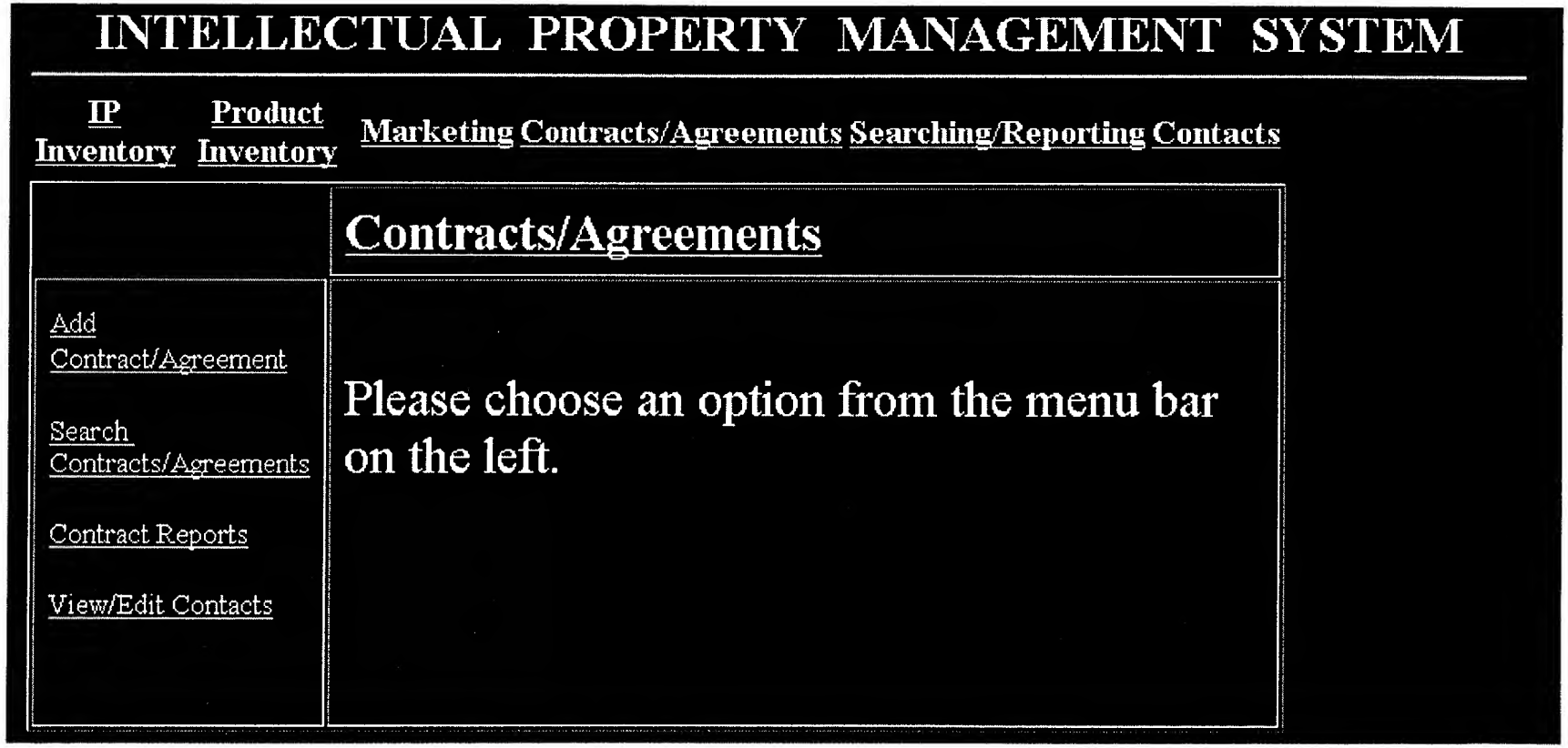

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contracts/Agreements
Add Contract/Agreement
Search Contracts/Agreements
Contract Reports
View/Edit Contacts
Please choose an option from the menu bar on the left.

FIG. 111

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contracts/Agreements Module
Add Contract/Agreement
Search Contracts/Agreements
Contract Reports
View/Edit Contacts
Add Contract/Agreement
Agreement Name
Agreement Number 12323
Agreement Type
Project Number
Product
Contract Summary
Exclusivity
Form of Agreement
Type of Revenue
Unique T&C
Frequency of Payments
Description
Termination or Renewal Terms

FIG. 112

Termination or Renewal Terms
Confidentiality Period
Notice Date
Effective Date
Termination/Renewal Date
Reason for Termination
BellSouth Business Unit
BellSouth Business Unit
Royalty Percentage
Add BellSouth BU
Remove BellSouth BU
Parties to the Contract
Company Name
Type
Contact
Add Party
Remove Party

FIG. 113

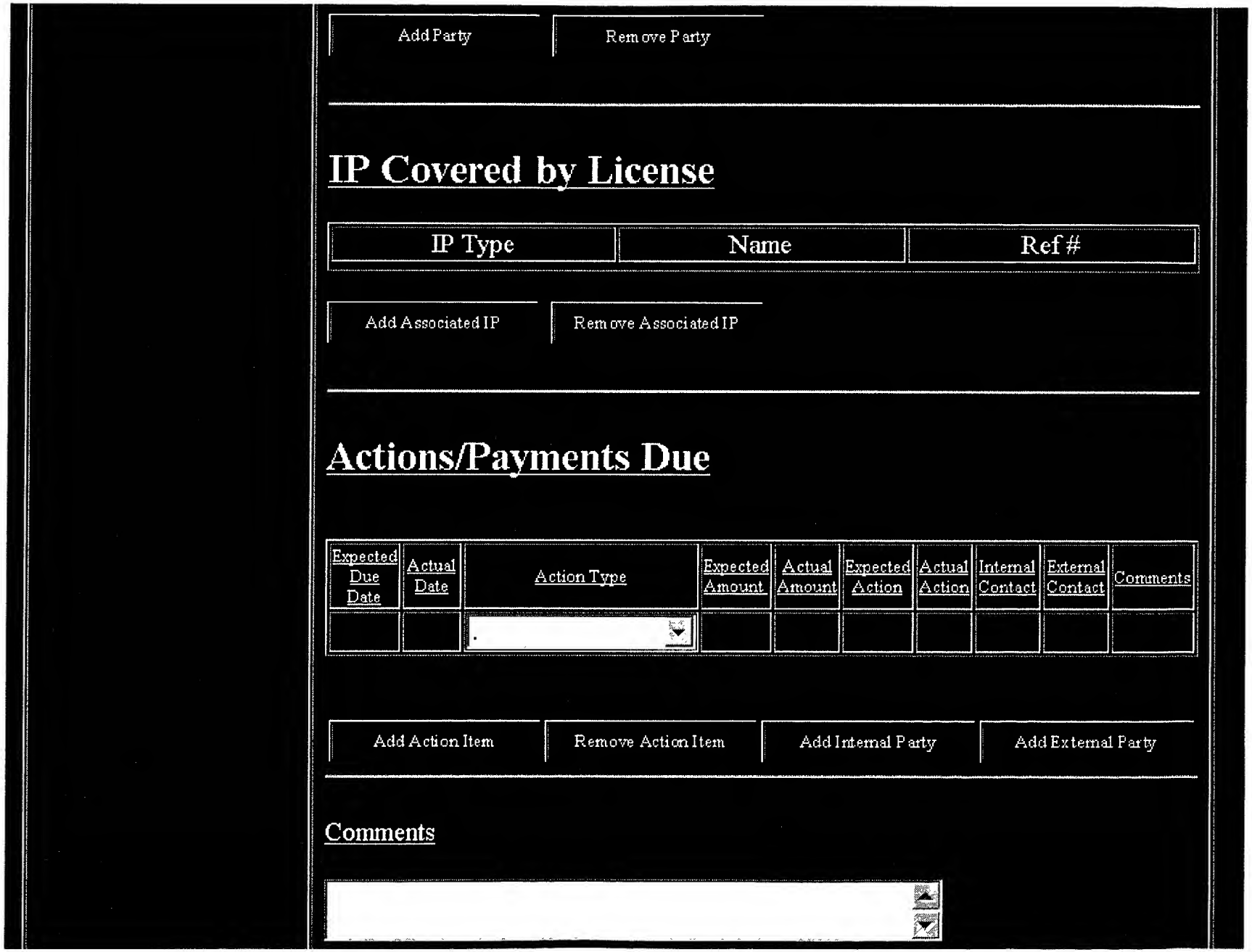

Add Party
Remove Party
IP Covered by License
IP Type
Name
Ref #
Add Associated IP
Remove Associated IP
Actions/Payments Due
Expected Due Date
Actual Date
Action Type
Expected Amount
Actual Amount
Expected Action
Actual Action
Internal Contact
External Contact
Comments
Add Action Item
Remove Action Item
Add Internal Party
Add External Party
Comments

FIG. 114

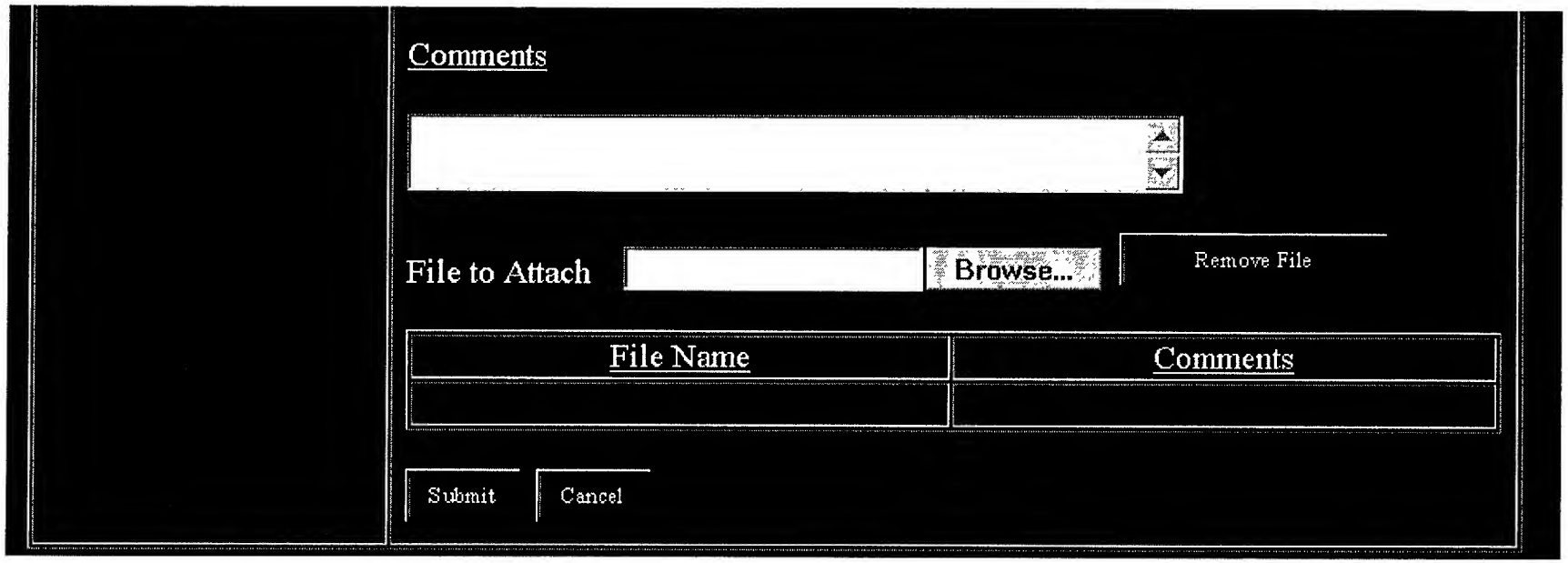

Comments
File to Attach
Browse...
Remove File
File Name
Comments
Submit
Cancel

FIG. 115

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contracts/Agreements Module
Add Contract/Agreement
Add Contract/Agreement
Search Contracts/Agreements
Contract Reports
View/Edit Contacts
Agreement Name
Agreement Number 12323
Agreement Type
Project Number
Administrative Services Agreement
Master Licensing Agreement
Sublicensing Agreement
Services Agreement
Sublease Agreement
Consulting Agreements
Recruiter Agreement
Remarketing Agreements
Form of Agreement
Type of Revenue
Unique T&C
Frequency of Payments
Description

FIG. 116

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contracts/Agreements Module
Add Contract/Agreement
Add Contract/Agreement
Search Contracts/Agreements
Contract Reports
View/Edit Contacts
Agreement Name
Agreement Number 12323
Agreement Type
Project Number
Product
Contract Summary
Exclusivity
Form of Agreement
Type of Revenue
Unique T&C
Distribution License
Straight Use License
Strategic Agreement
Frequency of Payments
Description

FIG. 117

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contracts/Agreements Module
Add Contract/Agreement
Search Contracts/Agreements
Contract Reports
View/Edit Contacts
Add Contract/Agreement
Agreement Name
Agreement Number 12323
Agreement Type
Project Number
Product
Contract Summary
Exclusivity
Form of Agreement
Type of Revenue
Unique T&C
Frequency of Pay
Cash
Savings
Cash & Savings
Description

FIG. 118

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contracts/Agreements Module
Add Contract/Agreement
Add Contract/Agreement
Search Contracts/Agreements
Contract Reports
View/Edit Contacts
Agreement Name
Agreement Number 12323
Agreement Type
Project Number
Product
Contract Summary
Exclusivity
Form of Agreement
Type of Revenue
Unique T&C
Frequency of Payments
One-time Development/Maintenance Savings
One Time Up-Front License Fee
One Time Up-Front License Fee w/ Future Royalties Due
Monthly Report/Royalty Payment
Quaterly Report/Royalty Payment
Annual Report/Royalty Payment

FIG. 119

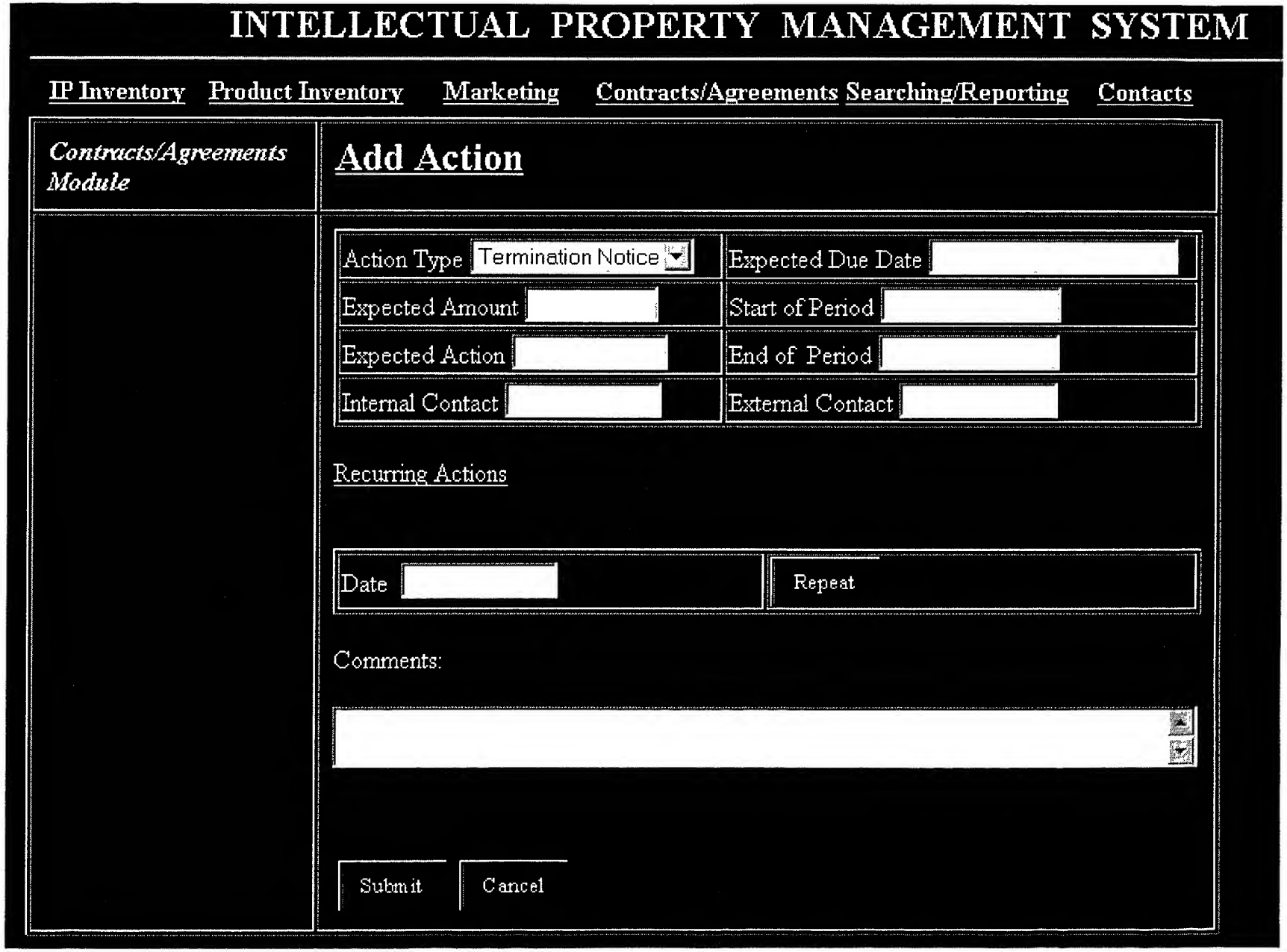

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contracts/Agreements Module
Add Action
Action Type
Termination Notice
Expected Due Date
Expected Amount
Start of Period
Expected Action
End of Period
Internal Contact
External Contact
Recurring Actions
Date
Repeat
Comments:
Submit
Cancel

FIG. 120

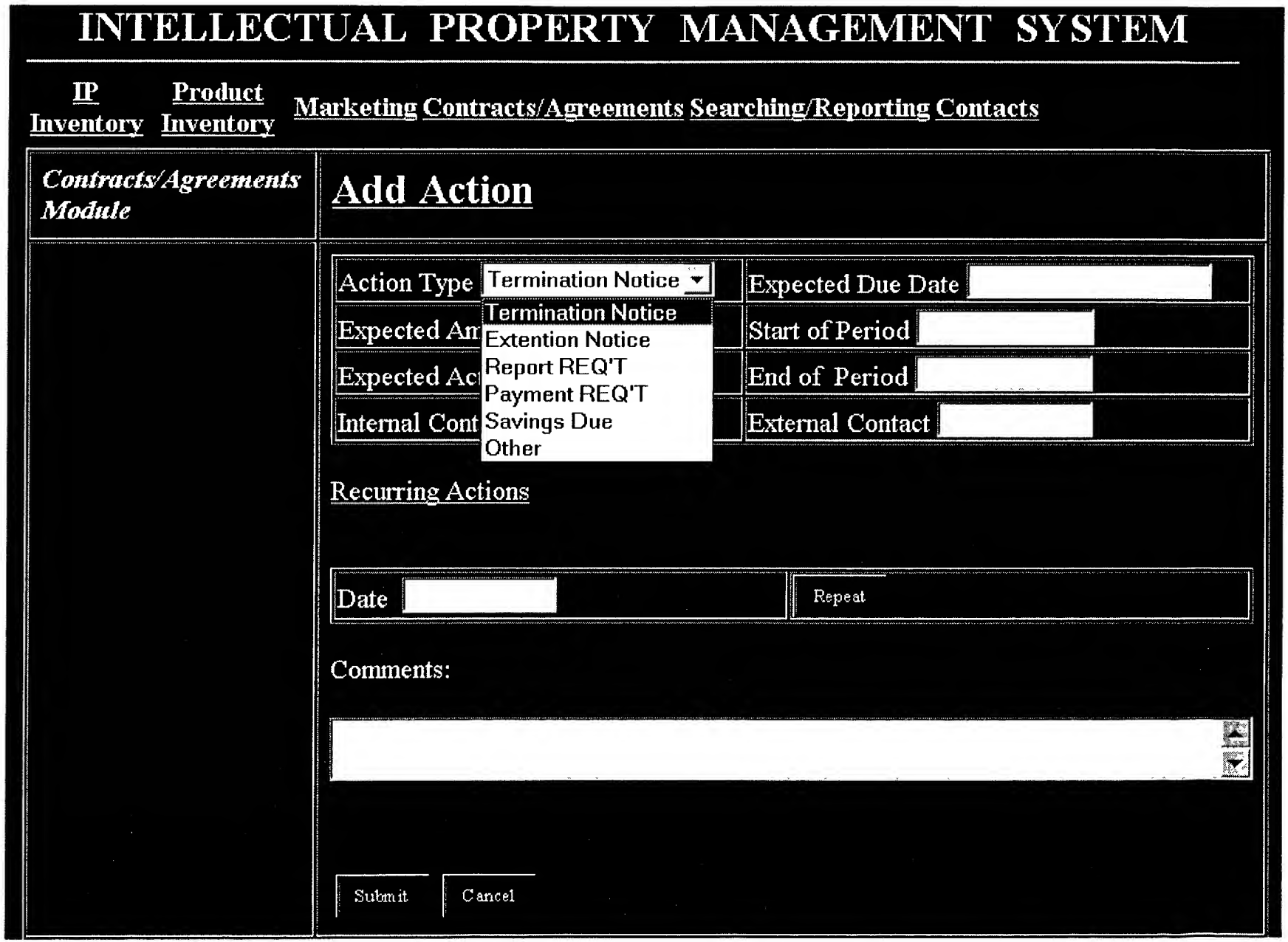

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contracts/Agreements Module
Add Action
Action Type
Termination Notice
Termination Notice
Extention Notice
Report REQ'T
Payment REQ'T
Savings Due
Other
Expected Ar
Expected Ac
Internal Cont
Expected Due Date
Start of Period
End of Period
External Contact
Recurring Actions
Date
Repeat
Comments:
Submit
Cancel

FIG. 120A

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contracts/Agreements Module
Search Contracts/Agreements
Add Contract/Agreement
Search Contracts/Agreements
Contract Reports
View/Edit Contacts
Agreement Name
Agreement Number
Agreement Type
Project Number
Product
Contract Summary
Exclusivity
Form of Agreement
Type of Revenue
Unique T&C
Frequency of Payments
Description

FIG. 121

Description
Termination or Renewal Terms
Confidentiality Period
Notice Date
Effective Date
Termination/Renewal Date
Reason for Termination
BellSouth Business Units
BellSouth Business Unit
Royalty Percentage
Add BellSouth BU
Remove BellSouth BU
Parties to the Contract
Company Name
Type
Contact
Add Party
Remove Party

FIG. 122

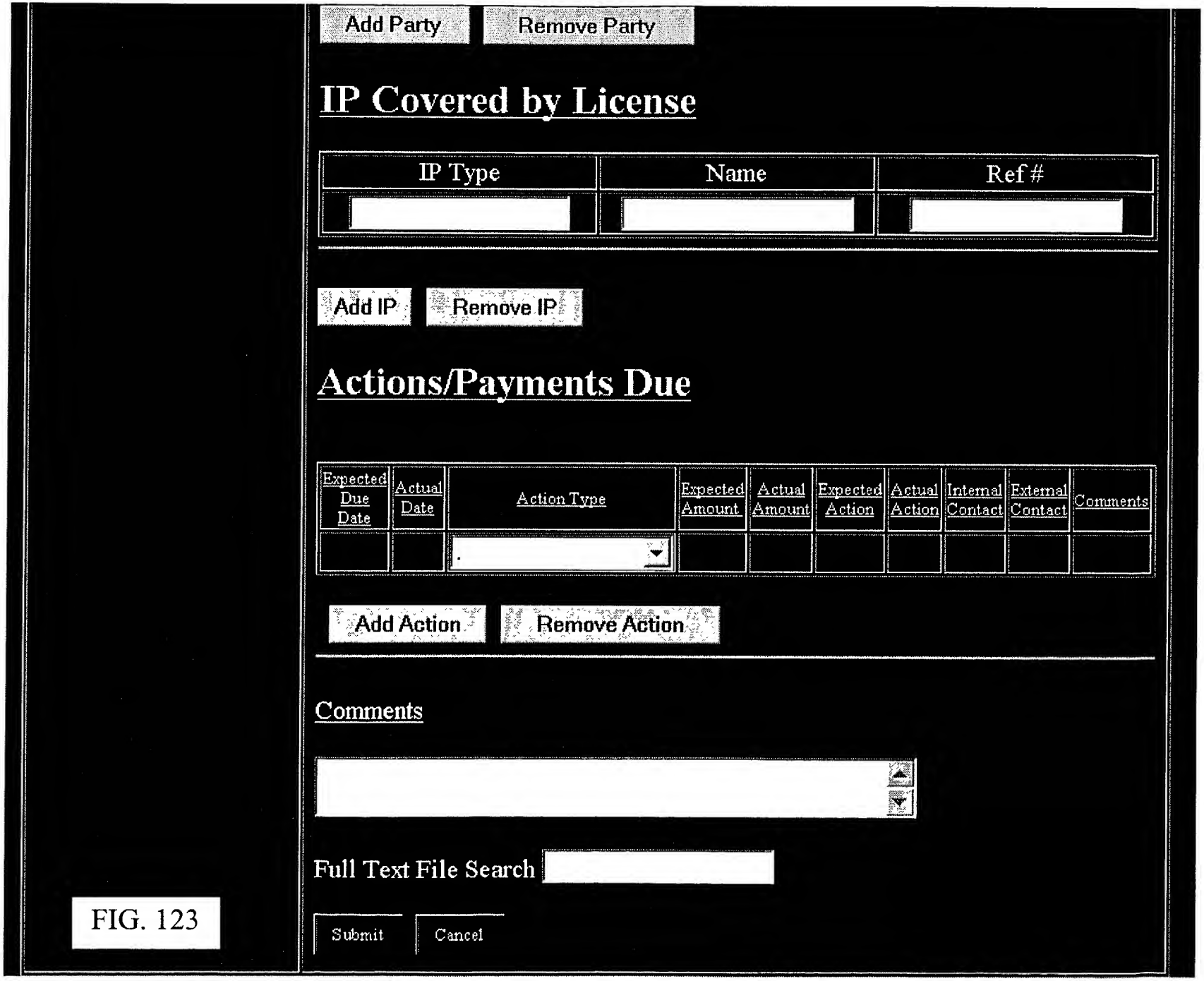

Add Party
Remove Party
IP Covered by License
IP Type
Name
Ref #
Add IP
Remove IP
Actions/Payments Due
Expected Due Date
Actual Date
Action Type
Expected Amount
Actual Amount
Expected Action
Actual Action
Internal Contact
External Contact
Comments
Add Action
Remove Action
Comments
Full Text File Search
Submit
Cancel

FIG. 123

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Search Results
Add Contract/Agreement
Search Contracts/Agreements
Contract Reports
View/Edit Contacts
Agreement Name
Agreement Number
Agreement Type
Project #
Data1
Data2
Data3
Data4

FIG. 124

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contracts/Agreements Module
Add Contract/Agreement
Search Contracts/Agreements
Contract Reports
View/Edit Contacts
Contract/Agreement
Agreement Name Name
Agreement Number 12323
Agreement Type Contract
Project Number 1234
Product Product
Contract Summary
Exclusivity Exclusive
Form of Agreement Straight Use License
Type of Revenue Cash
Unique T&C Text
Frequency of Payments Annual Report/Royalty Payment
Description A nice piece of IP
Termination or Renewal Terms
Confidentiality Period 2/14/2000
Notice Date 2/14/2000

FIG. 125

Confidentiality Period 2/14/2000	Notice Date 2/14/2000
Effective Date 2/14/2000	
Termination/Renewal Date 2/14/2000	Reason for Termination None

BellSouth Business Unit

BellSouth Business Unit	Royalty Percentage
Cellular	100

Parties to the Contract

Company Name	Type	Contact
Party	Remarking	Carter Pate

IP Covered by License

IP Type	Name	Ref #
Patent	Cell Phone	1234

Actions/Payments Due

FIG. 126

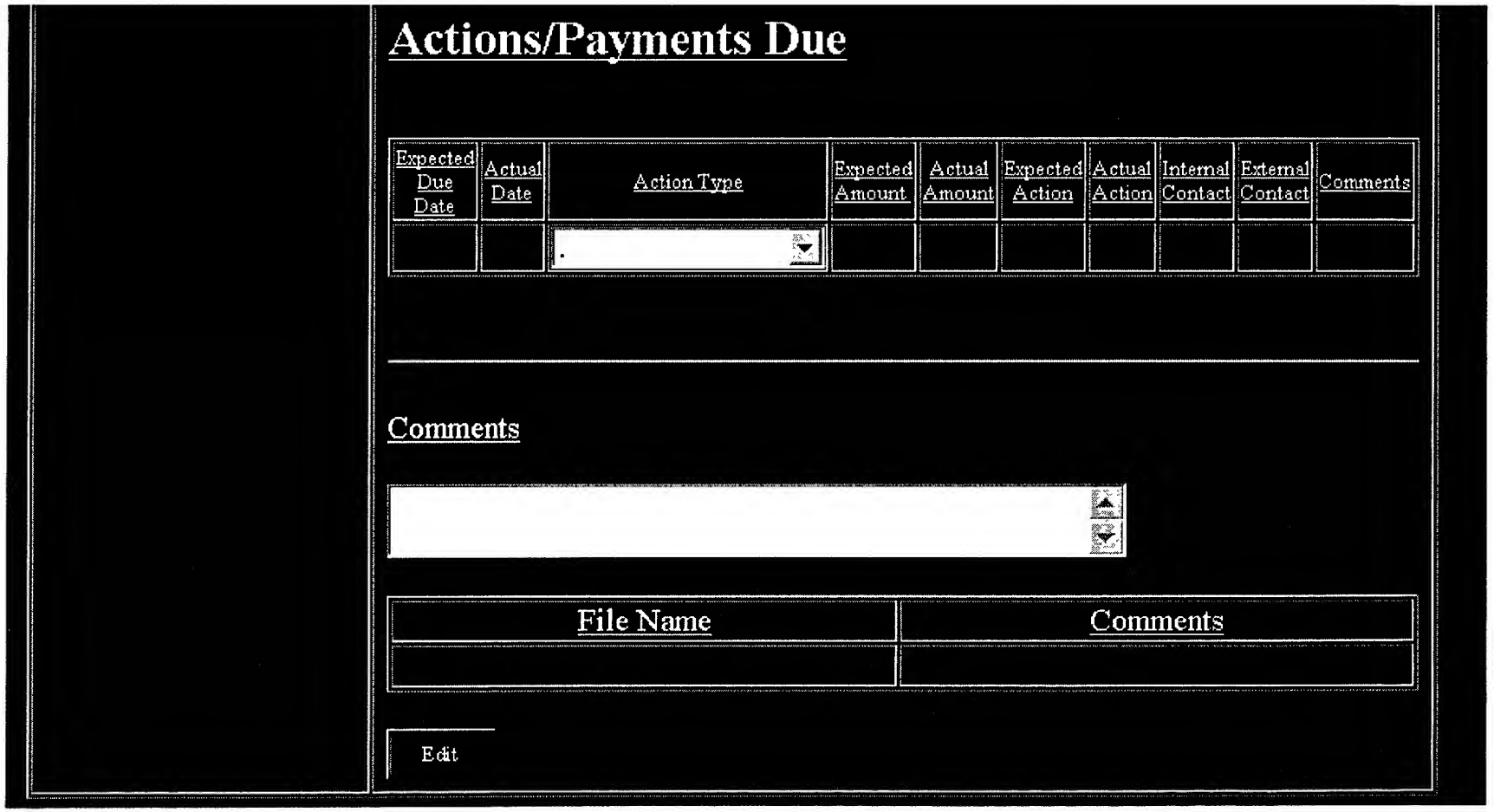

Actions/Payments Due
Expected Due Date
Actual Date
Action Type
Expected Amount
Actual Amount
Expected Action
Actual Action
Internal Contact
External Contact
Comments
Comments
File Name
Comments
Edit

FIG. 127

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contracts/Agreements Module
Edit Contract/Agreement
Add Contract/Agreement
Search Contracts/Agreements
Contract Reports
View/Edit Contacts
Agreement Name
Agreement Number 12323
Agreement Type
Project Number
Product
Contract Summary
Exclusivity
Form of Agreement
Type of Revenue
Unique T&C
Frequency of Payments
Description
Termination or Renewal Terms

FIG. 128

Termination or Renewal Terms

Confidentiality Period	Notice Date
Effective Date	
Termination/Renewal Date	Reason for Termination

BellSouth Business Units

BellSouth Business Unit	Royalty Percentage

Add BellSouth BU | Remove BellSouth BU

Parties to the Contract

Company Name	Type	Contact

Add Party | Remove Party

IP Covered by License

FIG. 129

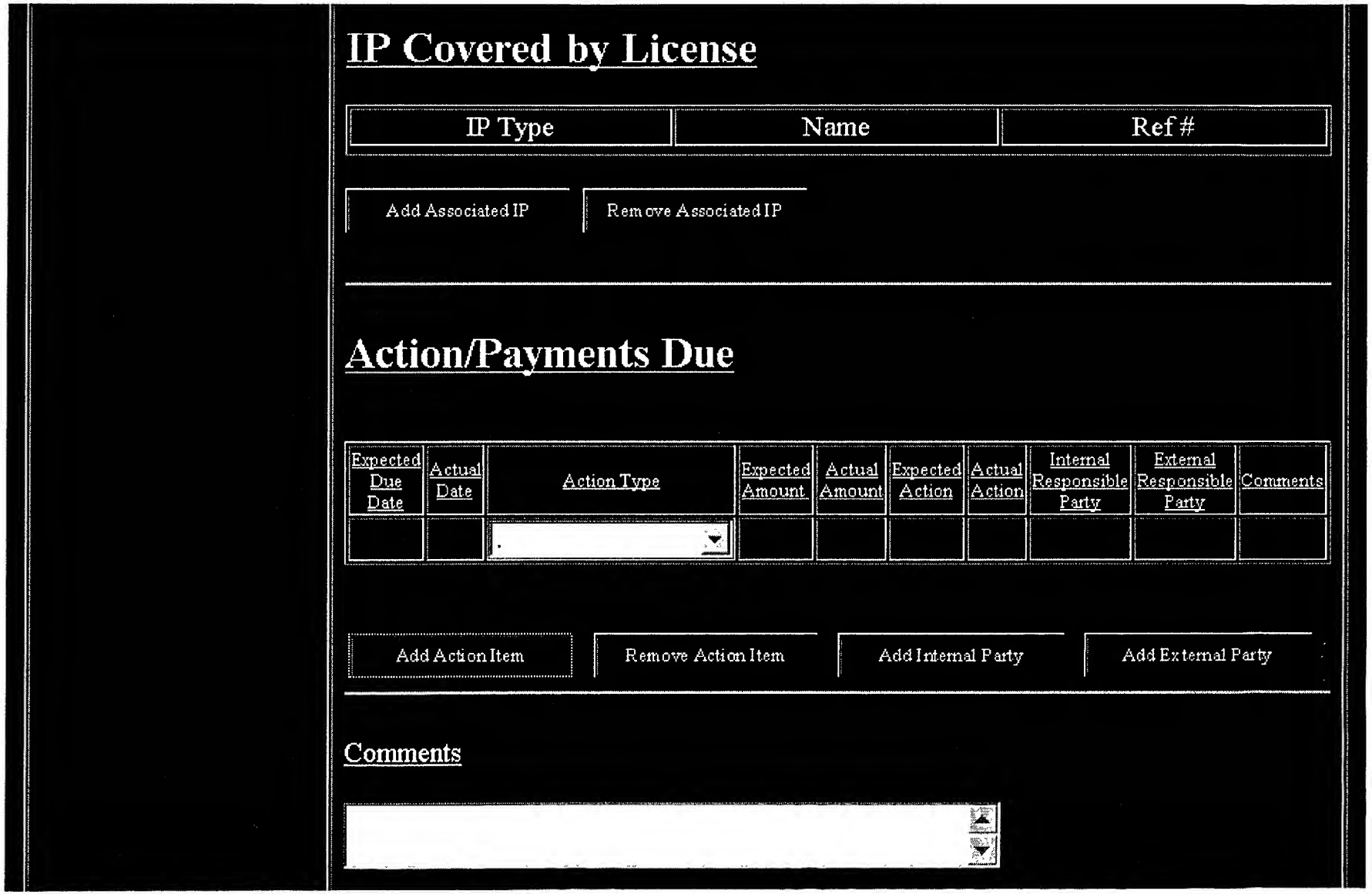

IP Covered by License
IP Type
Name
Ref #
Add Associated IP
Remove Associated IP
Action/Payments Due
Expected Due Date
Actual Date
Action Type
Expected Amount
Actual Amount
Expected Action
Actual Action
Internal Responsible Party
External Responsible Party
Comments
Add Action Item
Remove Action Item
Add Internal Party
Add External Party
Comments

FIG. 130

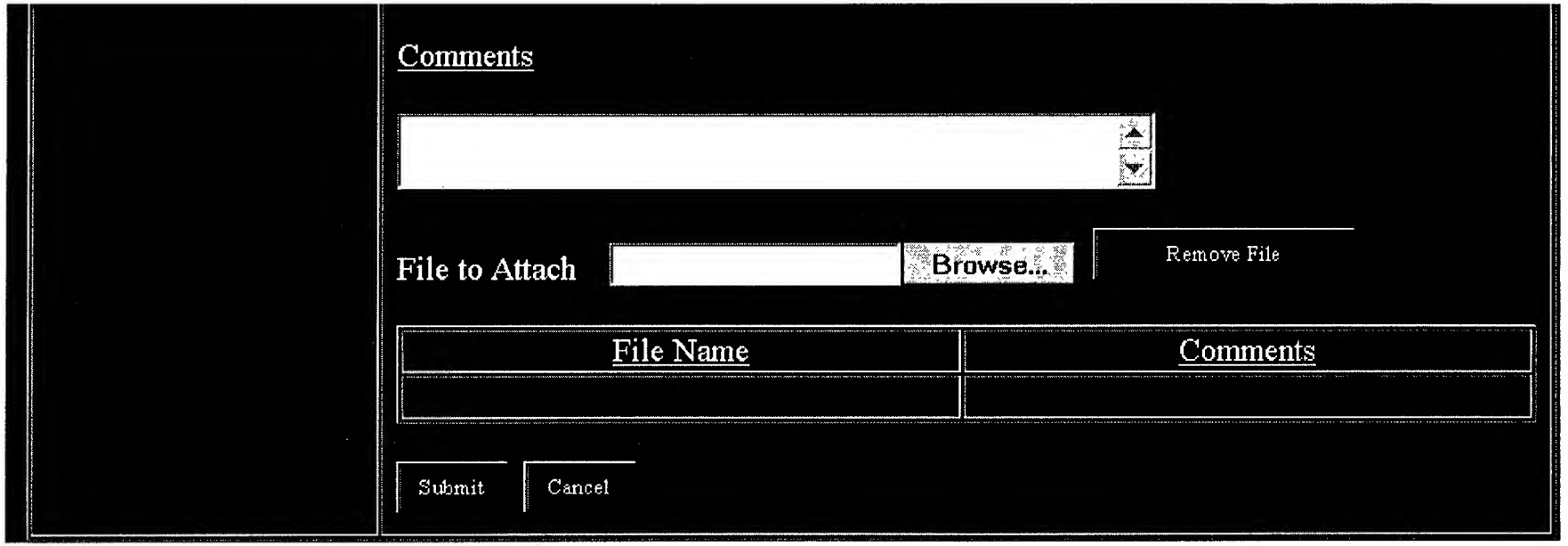

Comments
File to Attach
Browse...
Remove File
File Name
Comments
Submit
Cancel

FIG. 131

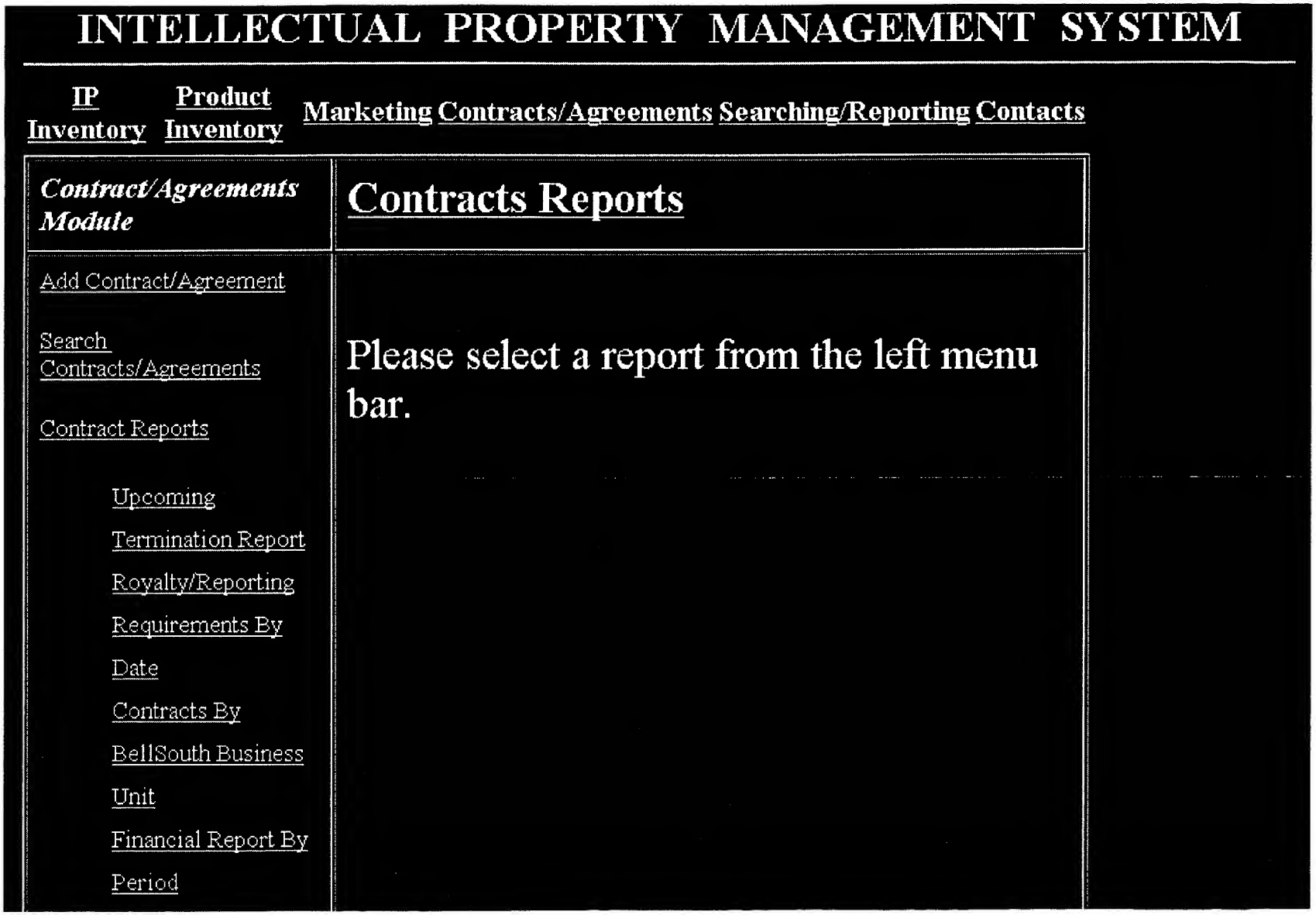

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contract/Agreements Module
Contracts Reports
Add Contract/Agreement
Search Contracts/Agreements
Contract Reports
Upcoming Termination Report
Royalty/Reporting Requirements By Date
Contracts By BellSouth Business Unit
Financial Report By Period
Please select a report from the left menu bar.

FIG. 132

Search Contracts/Agreements
Contract Reports
Upcoming Termination Report
Royalty/Reporting Requirements By Date
Contracts By BellSouth Business Unit
Financial Report By Period
Financial Report By BellSouth Business Unit
Action Report
Party Report
View/Edit Contacts
Please select a report from the left menu bar.

FIG. 133

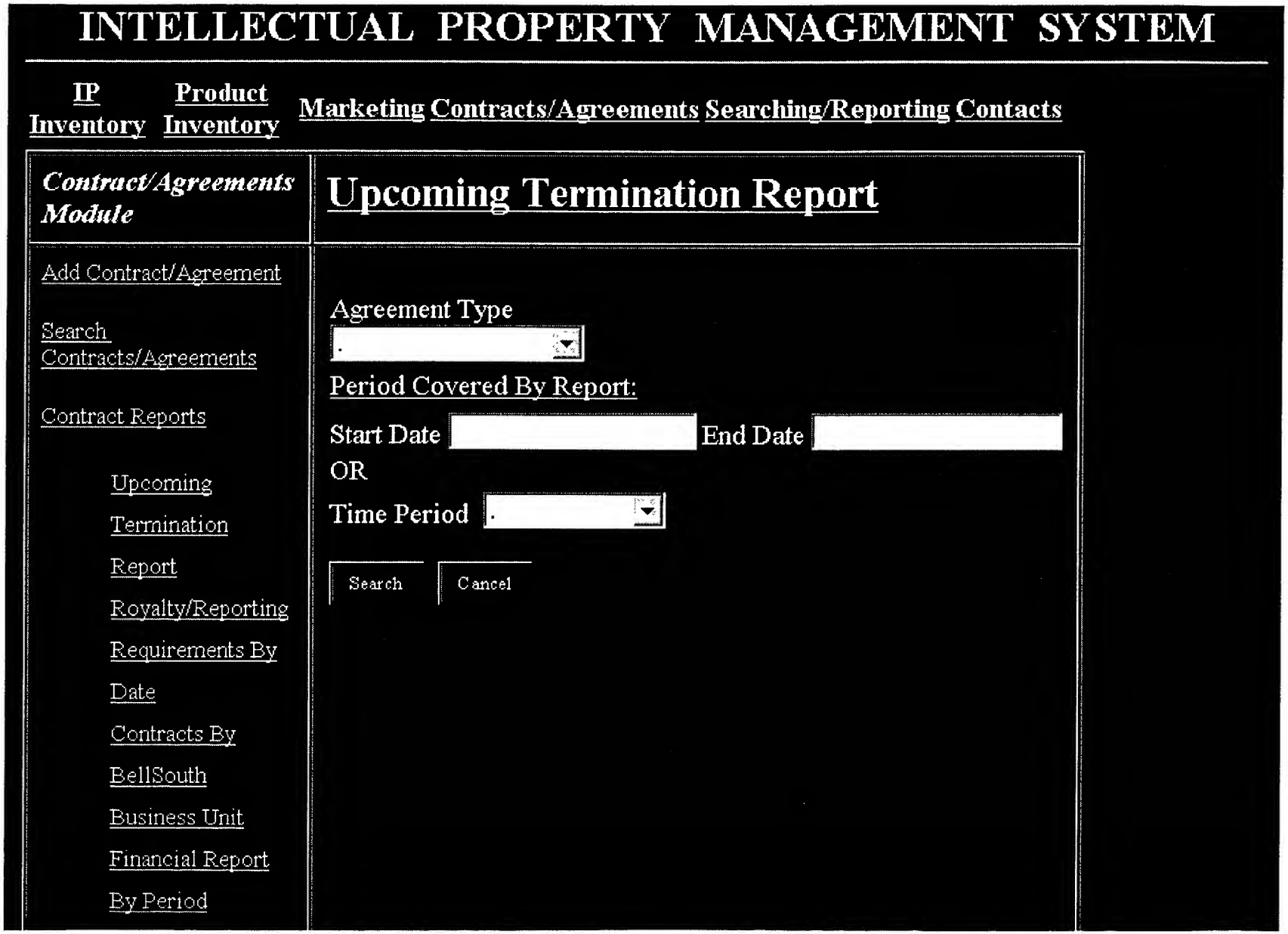

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contract/Agreements Module
Upcoming Termination Report
Add Contract/Agreement
Search Contracts/Agreements
Contract Reports
Upcoming Termination Report
Royalty/Reporting Requirements By Date
Contracts By BellSouth Business Unit
Financial Report By Period
Agreement Type
Period Covered By Report:
Start Date
End Date
OR
Time Period
Search
Cancel

FIG. 134

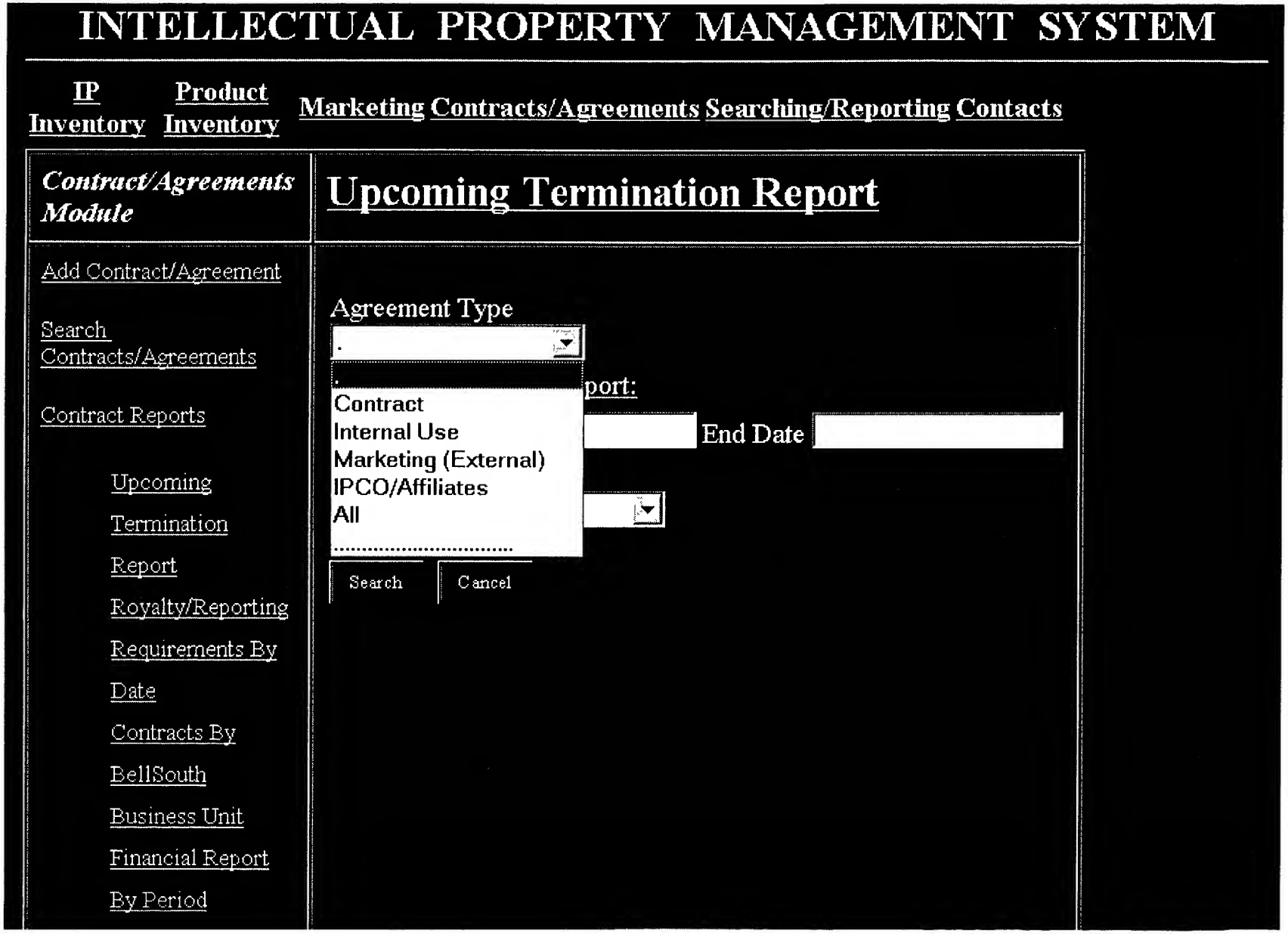

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contract/Agreements Module
Upcoming Termination Report
Add Contract/Agreement
Search Contracts/Agreements
Contract Reports
Upcoming Termination Report
Royalty/Reporting Requirements By Date
Contracts By BellSouth Business Unit
Financial Report By Period
Agreement Type
Contract
Internal Use
Marketing (External)
IPCO/Affiliates
All
End Date
Search
Cancel

FIG. 135

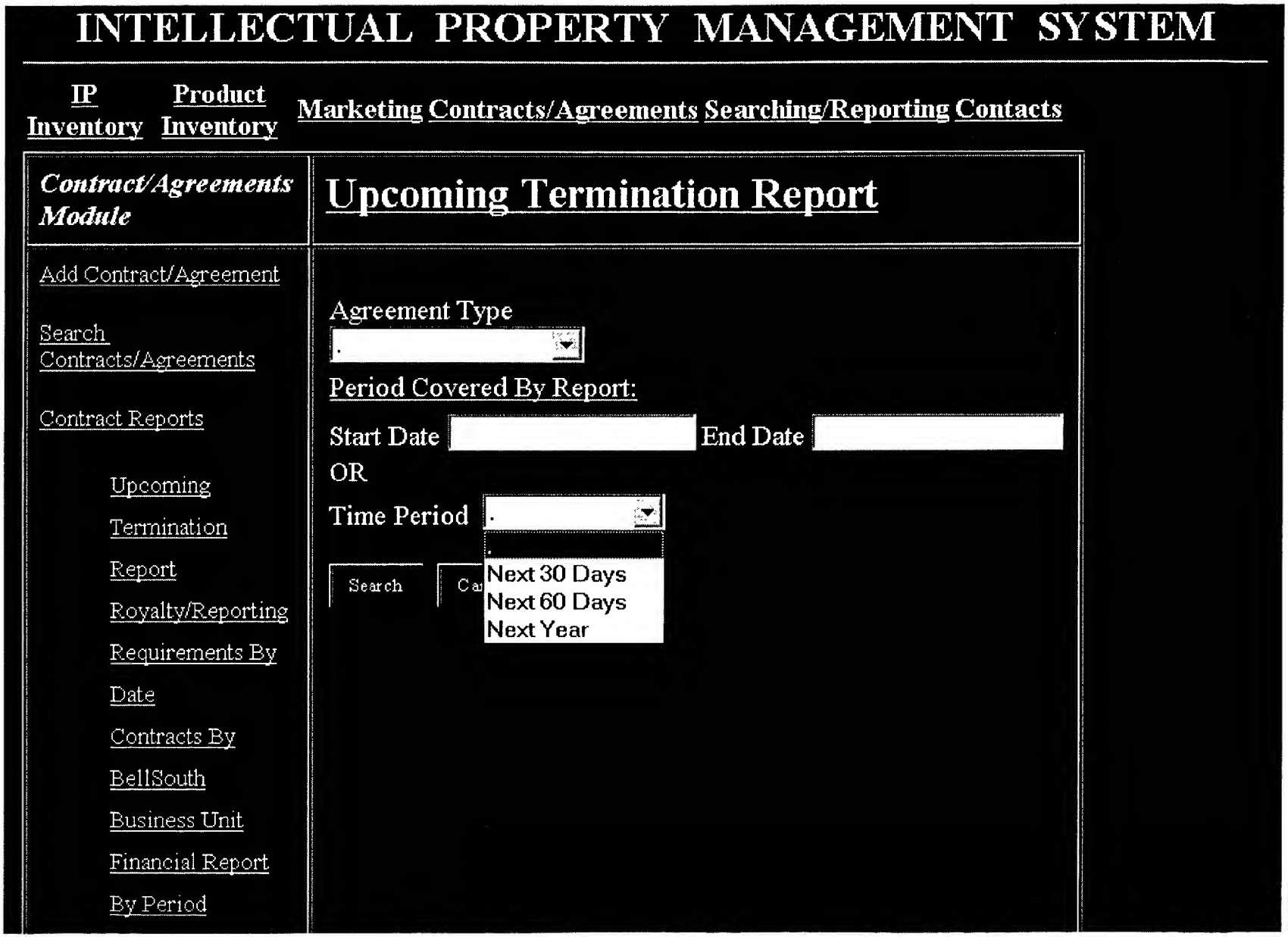

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contract/Agreements Module
Upcoming Termination Report
Add Contract/Agreement
Search Contracts/Agreements
Contract Reports
Upcoming Termination Report
Royalty/Reporting Requirements By Date
Contracts By BellSouth Business Unit
Financial Report By Period
Agreement Type
Period Covered By Report:
Start Date
End Date
OR
Time Period
Next 30 Days
Next 60 Days
Next Year
Search

FIG. 136

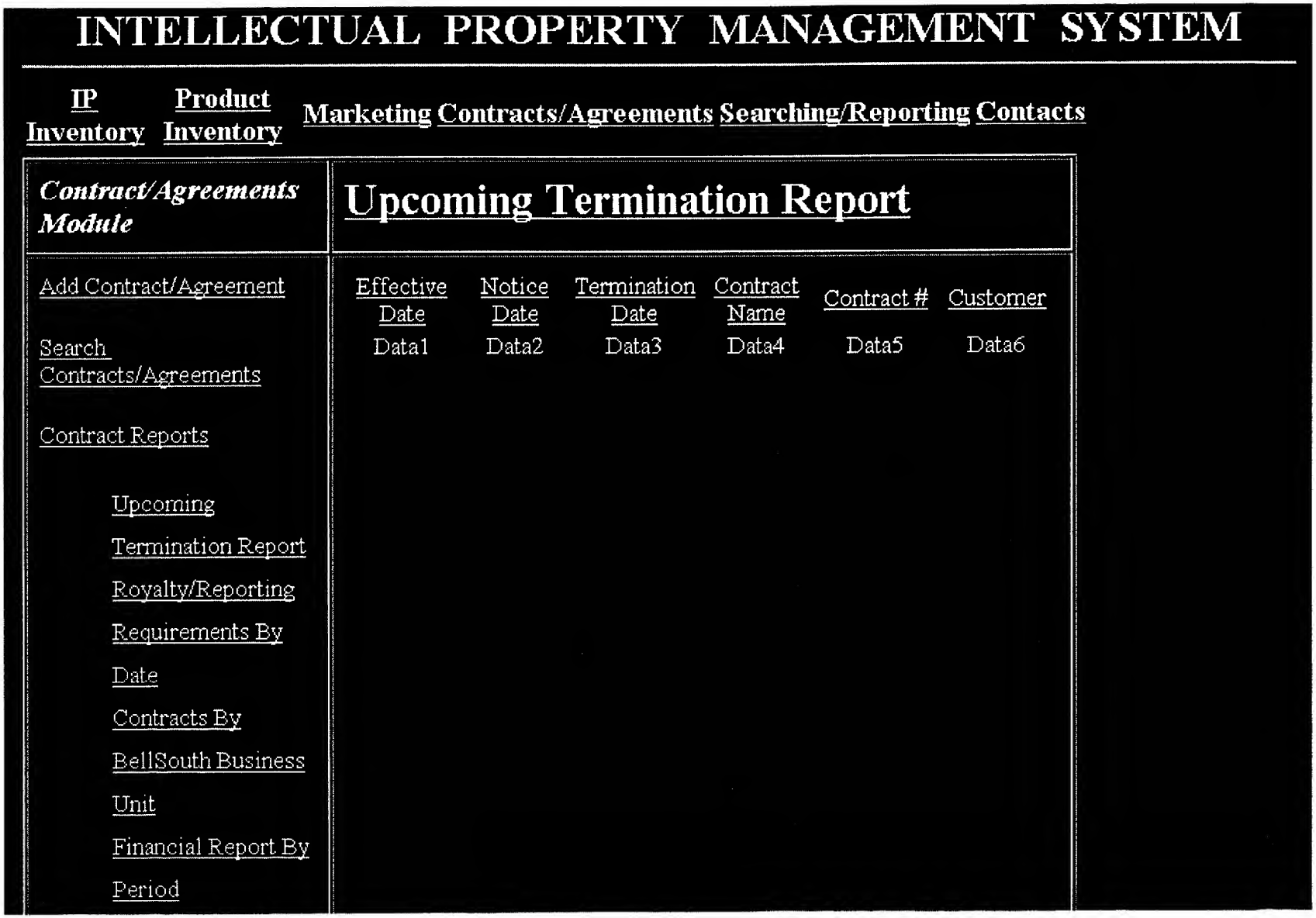

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contract/Agreements Module
Upcoming Termination Report
Add Contract/Agreement
Search Contracts/Agreements
Contract Reports
Upcoming Termination Report
Royalty/Reporting Requirements By Date
Contracts By BellSouth Business Unit
Financial Report By Period
Effective Date
Notice Date
Termination Date
Contract Name
Contract #
Customer
Data1
Data2
Data3
Data4
Data5
Data6

FIG. 137

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory | Product Inventory | Marketing | Contracts/Agreements | Searching/Reporting | Contacts

Contract/Agreements Module

- Add Contract/Agreement
- Search Contracts/Agreements
- Contract Reports
  - Upcoming Termination Report
  - Royalty/Reporting Requirements By Date
  - Contracts By BellSouth Business Unit
  - Financial Report By Period

Royalty/Reporting Requirements By Date Report

Agreement Type [.]

Period Covered By Report:

Start Date [ ] End Date [ ]

OR

Time Period [.]

[Search] [Cancel]

FIG. 138

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory | Product Inventory | Marketing | Contracts/Agreements | Searching/Reporting | Contacts

Contract/Agreement Module

Add Contract/Agreement

Search Contracts/Agreements

Contract Reports

- Upcoming Termination Report
- Royalty/Reporting Requirements By Date
- Contracts By BellSouth Business Unit
- Financial Report By Period
- Financial Report By BellSouth Business Unit

Royalty/Reporting Requirements By Date Report

Contract Name	Expected Action Due Date	Actual Action Date	Action Type	Expected Amount	Actual Amount	Expected Action	Actual Action
Data	Data	Data	Data	Data	Data	Data	Data

FIG. 139

DRAFT - 10/05/2

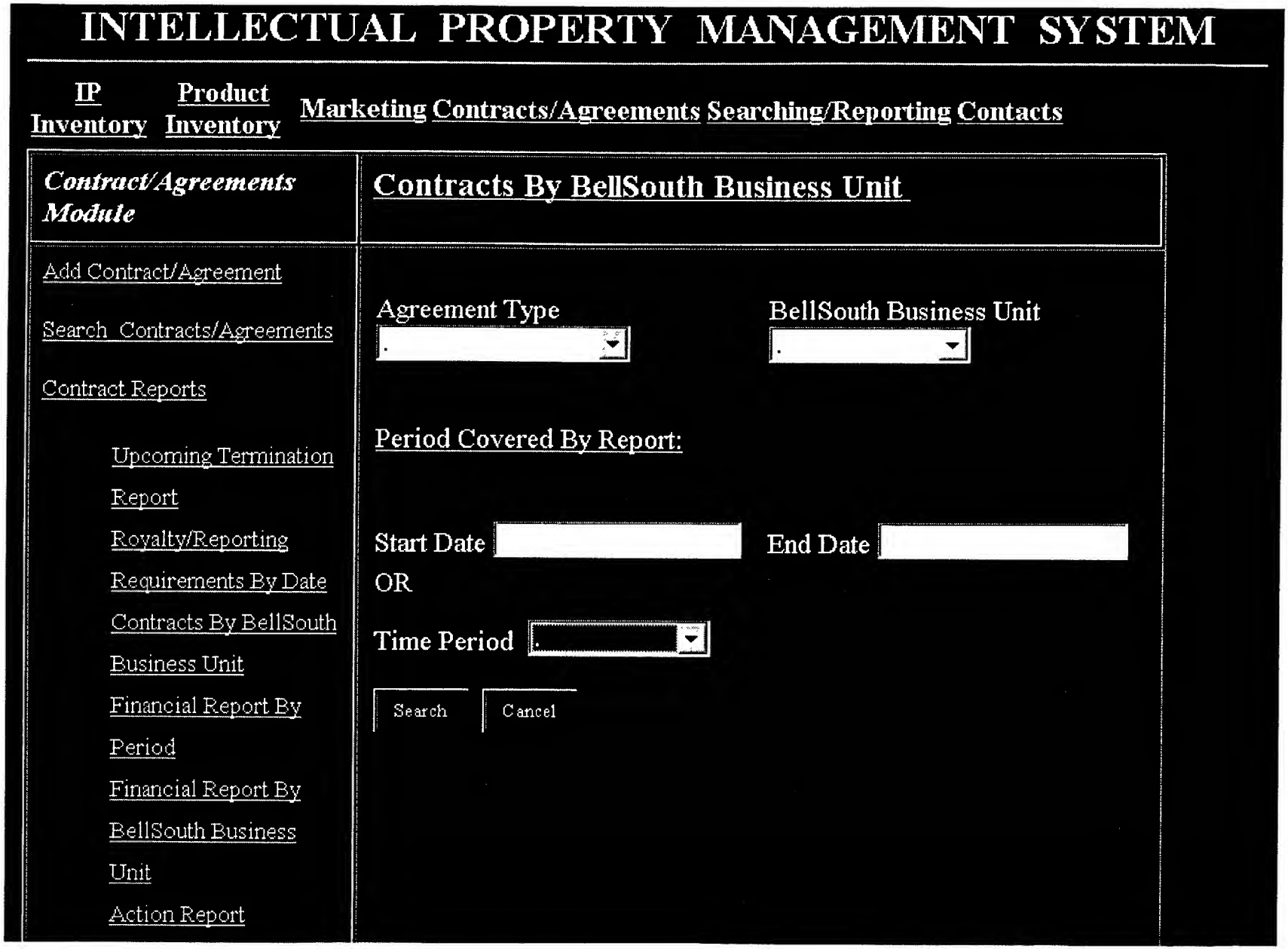


FIG. 140

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory | Product Inventory | Marketing | Contracts/Agreements | Searching/Reporting | Contacts

Contract/Agreement Module

- Add Contract/Agreement
- Search Contracts/Agreements
- Contract Reports
  - Upcoming Termination Report
  - Royalty/Reporting Requirements By Date
  - Contracts By BellSouth Business Unit
  - Financial Report By Period
  - Financial Report By BellSouth Business Unit
  - Action Report

Contracts By BellSouth Business Unit

Period Covered By Report: Date Report Run:

BellSouth Business Unit	Agreement Name	Product	Parties	Effective Date	Termination Date
Data	Data	Data	Data	Data	Data

FIG. 141

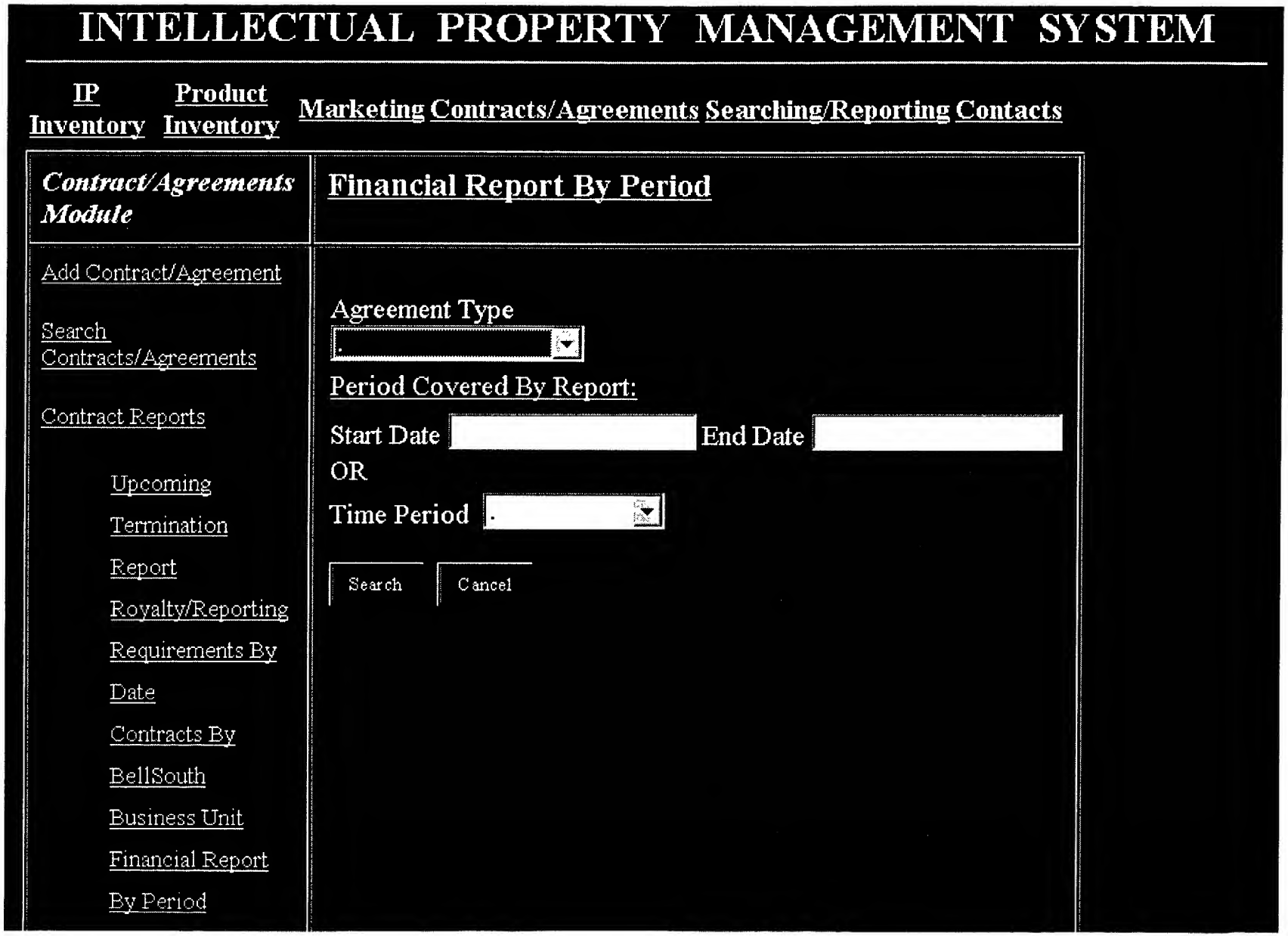

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contract/Agreements Module
Financial Report By Period
Add Contract/Agreement
Search Contracts/Agreements
Contract Reports
Upcoming Termination Report
Royalty/Reporting Requirements By Date
Contracts By BellSouth Business Unit
Financial Report By Period
Agreement Type
Period Covered By Report:
Start Date
End Date
OR
Time Period
Search
Cancel

FIG. 142

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory | Product Inventory | Marketing | Contracts/Agreements | Searching/Reporting | Contacts

Contract/Agreement Module

- Add Contract/Agreement
- Search Contracts/Agreements
- Contract Reports
  - Upcoming Termination Report
  - Royalty/Reporting Requirements By Date
  - Contracts By BellSouth Business Unit
  - Financial Report By Period
  - Financial Report By BellSouth Business Unit
  - Action Report

Financial Report By Period

Period Covered By Report: Date Report Run:

Contract Name	BellSouth Business Unit	Parties	Amount Due	Date Due	External Contact
Data	Data	Data	Data	Data	Data

FIG. 143

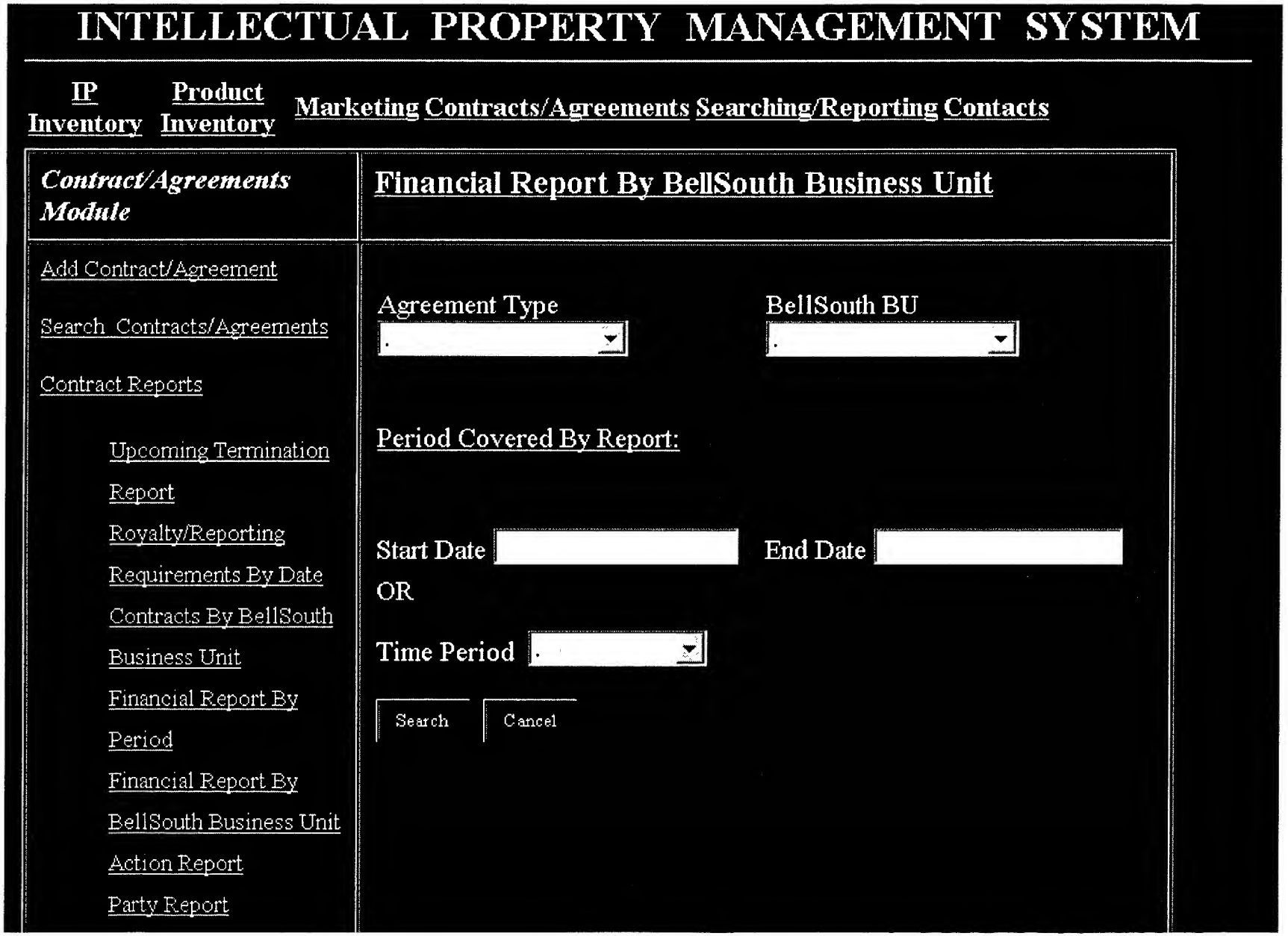

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contract/Agreements Module
Financial Report By BellSouth Business Unit
Add Contract/Agreement
Search Contracts/Agreements
Contract Reports
Upcoming Termination Report
Royalty/Reporting Requirements By Date
Contracts By BellSouth Business Unit
Financial Report By Period
Financial Report By BellSouth Business Unit
Action Report
Party Report
Agreement Type
BellSouth BU
Period Covered By Report:
Start Date
End Date
OR
Time Period
Search
Cancel

FIG. 144

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory | Product Inventory | Marketing | Contracts/Agreements | Searching/Reporting | Contacts

Contract/Agreement Module

Add Contract/Agreement

Search Contracts/Agreements

Contract Reports

- Upcoming Termination Report
- Royalty/Reporting Requirements By Date
- Contracts By BellSouth Business Unit
- Financial Report By Period
- Financial Report By BellSouth Business Unit
- Action Report

Financial Report By BellSouth Business Unit

Period Covered By Report: Date Report Run:

Parties	BellSouth Business Unit	Agreement Name	Expected Amount	Actual Amount	Date Due	External Contact
Data	Data	Data	Data	Data	Data	Data

FIG. 145

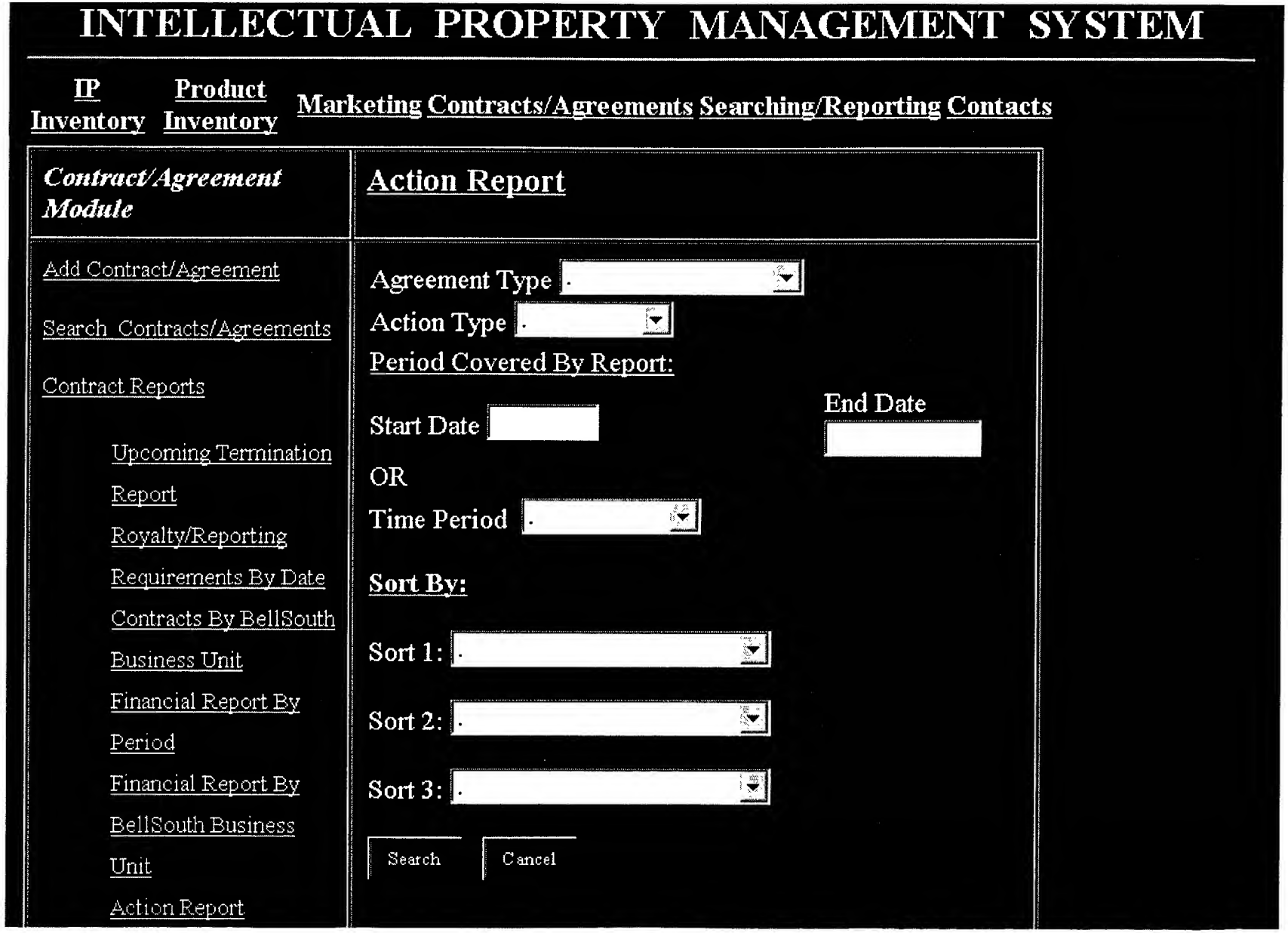

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contract/Agreement Module
Action Report
Add Contract/Agreement
Search Contracts/Agreements
Contract Reports
Upcoming Termination Report
Royalty/Reporting Requirements By Date
Contracts By BellSouth Business Unit
Financial Report By Period
Financial Report By BellSouth Business Unit
Action Report
Agreement Type
Action Type
Period Covered By Report:
Start Date
End Date
OR
Time Period
Sort By:
Sort 1:
Sort 2:
Sort 3:
Search
Cancel

FIG. 146

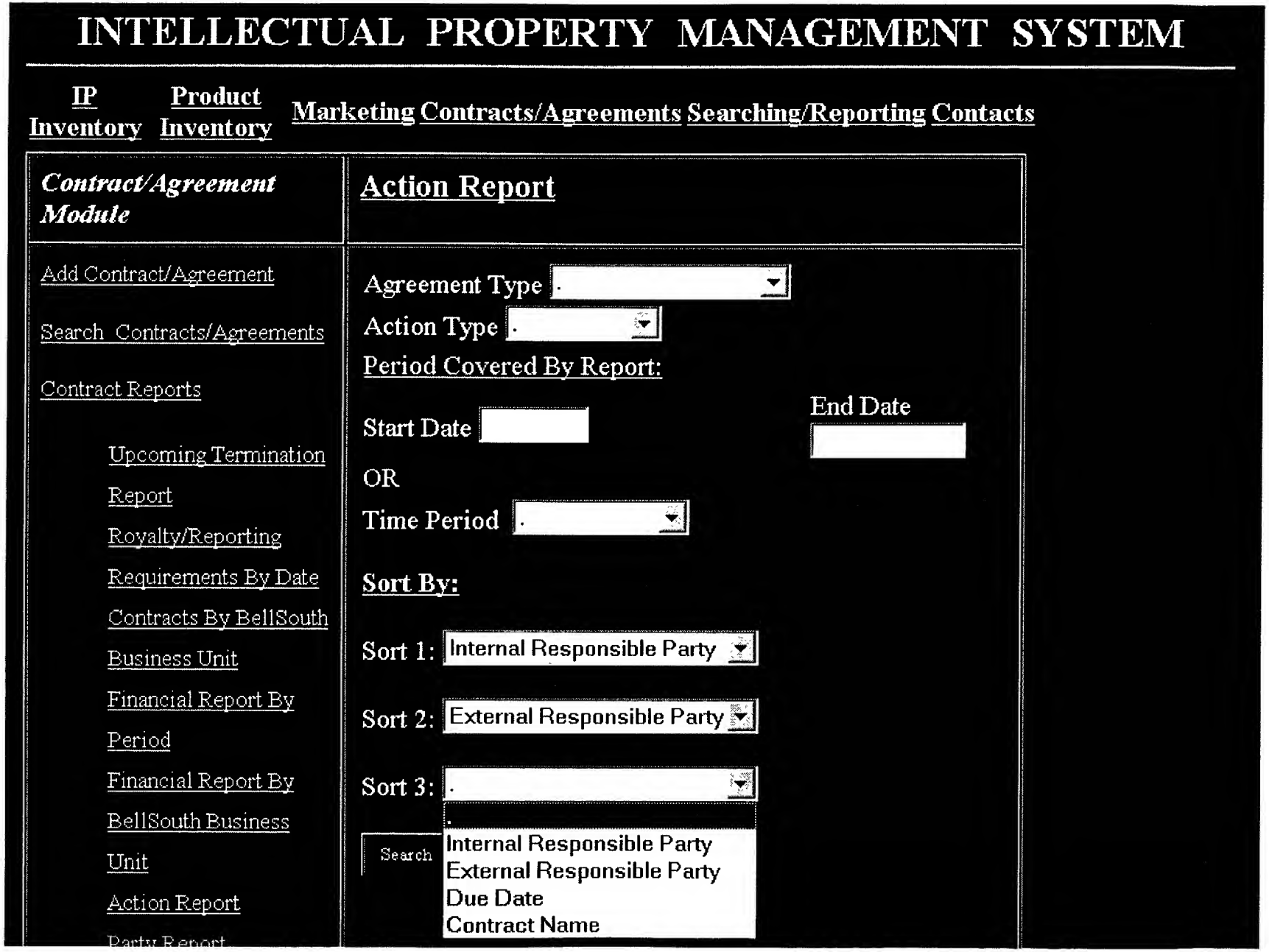

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contract/Agreement Module
Action Report
Add Contract/Agreement
Search Contracts/Agreements
Contract Reports
Upcoming Termination Report
Royalty/Reporting Requirements By Date
Contracts By BellSouth Business Unit
Financial Report By Period
Financial Report By BellSouth Business Unit
Action Report
Party Report
Agreement Type
Action Type
Period Covered By Report:
Start Date
End Date
OR
Time Period
Sort By:
Sort 1: Internal Responsible Party
Sort 2: External Responsible Party
Sort 3:
Search
Internal Responsible Party
External Responsible Party
Due Date
Contract Name

FIG. 147

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory | Product Inventory | Marketing | Contracts/Agreements | Searching/Reporting | Contacts

Contract/Agreement Module

- Add Contract/Agreement
- Search Contracts/Agreements
- Contract Reports
  - Upcoming Termination Report
  - Royalty/Reporting Requirements By Date
  - Contracts By BellSouth Business Unit
  - Financial Report By Period

Action Report

Period Covered By Report: Date Report Run:

Expected Due Date	Agreement Name	Action Type	Expected Action	Expected Amount	Internal Contact	External Contact
Data	Data	Data	Data	Data	Data	Data

FIG. 148

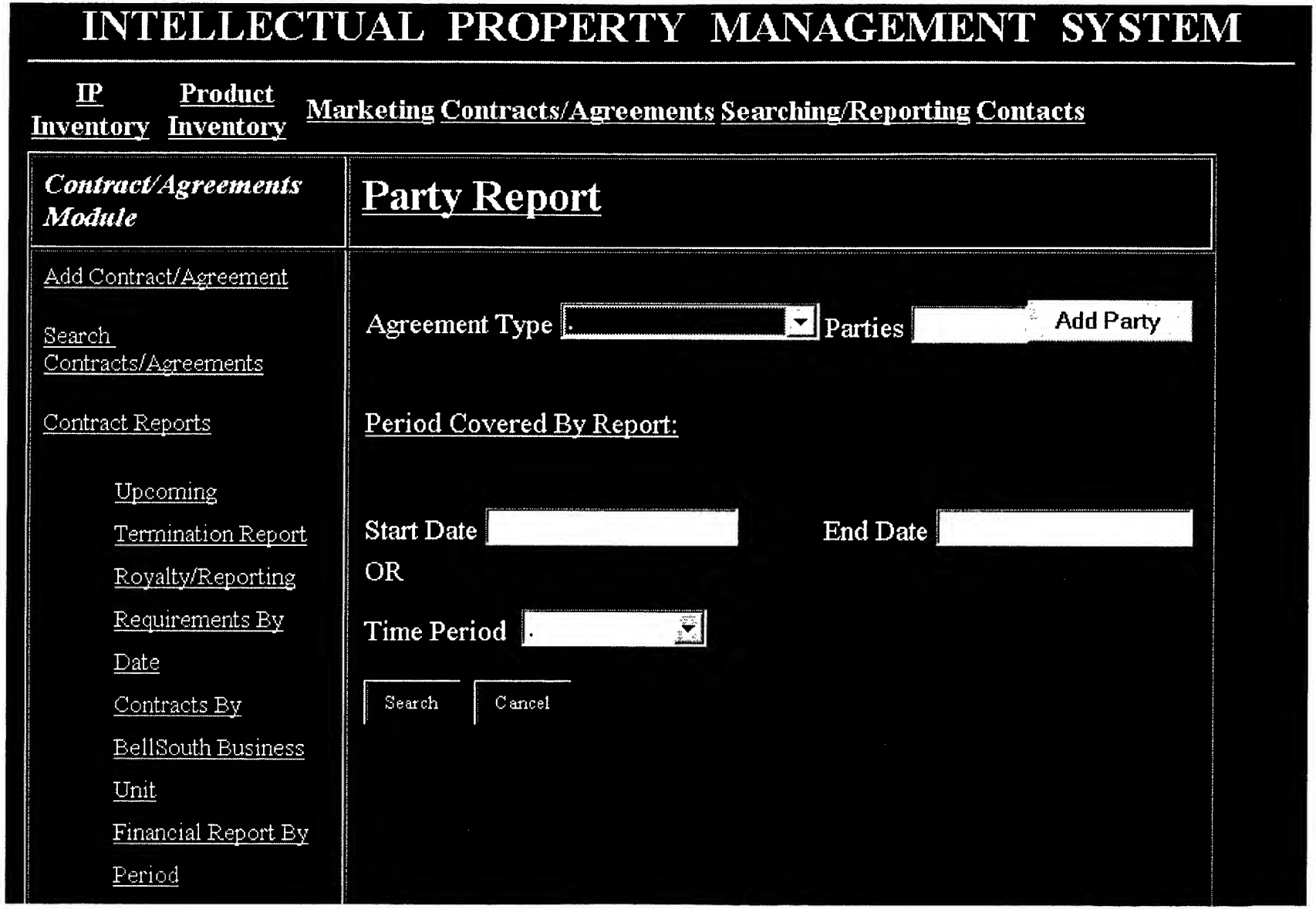

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contract/Agreements Module
Party Report
Add Contract/Agreement
Search Contracts/Agreements
Contract Reports
Upcoming Termination Report
Royalty/Reporting Requirements By Date
Contracts By BellSouth Business Unit
Financial Report By Period
Agreement Type
Parties
Add Party
Period Covered By Report:
Start Date
End Date
OR
Time Period
Search
Cancel

FIG. 149

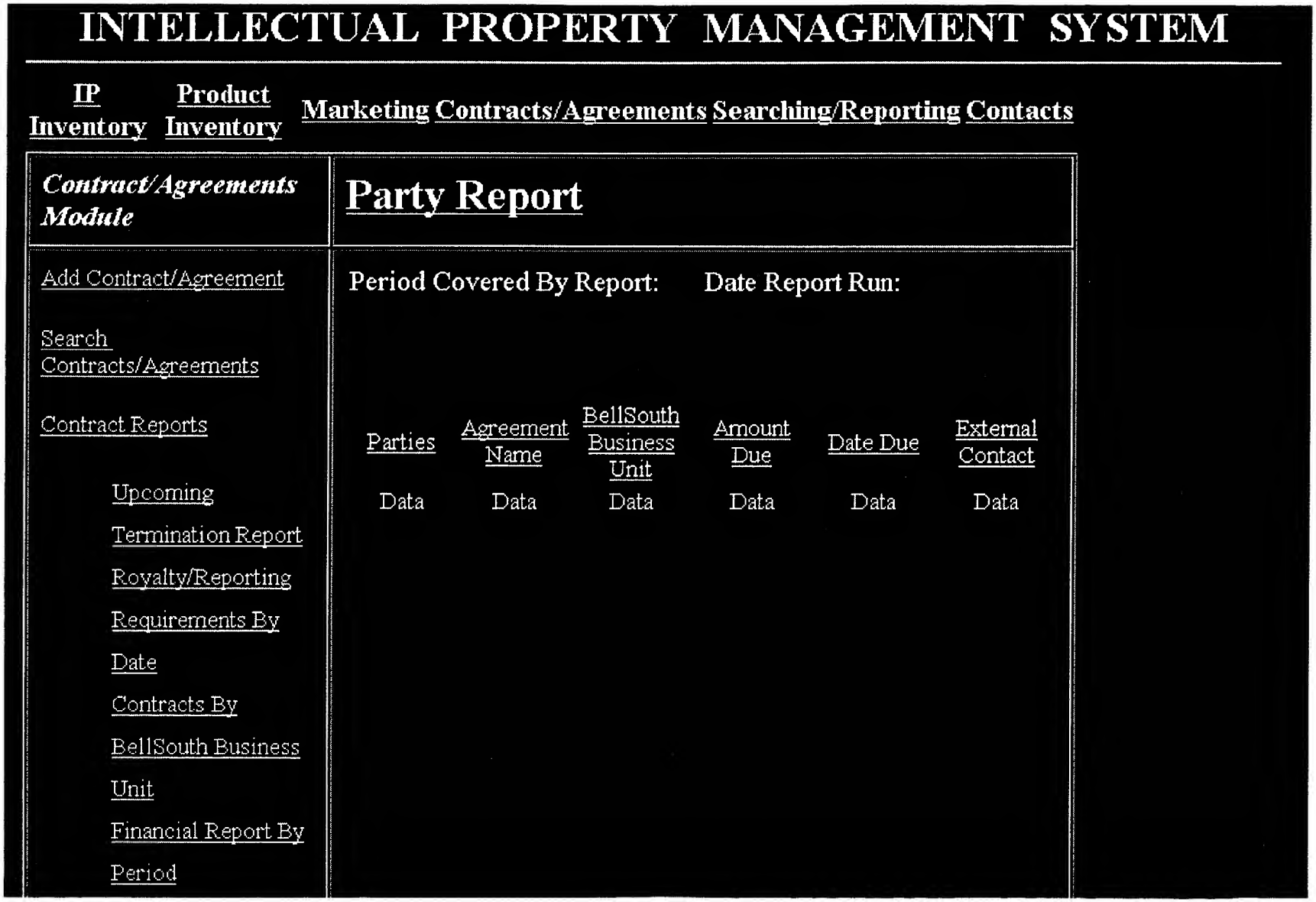

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Contract/Agreements Module
Party Report
Add Contract/Agreement
Search Contracts/Agreements
Contract Reports
Upcoming Termination Report
Royalty/Reporting Requirements By Date
Contracts By BellSouth Business Unit
Financial Report By Period
Period Covered By Report:
Date Report Run:
Parties
Agreement Name
BellSouth Business Unit
Amount Due
Date Due
External Contact
Data
Data
Data
Data
Data
Data

FIG. 150

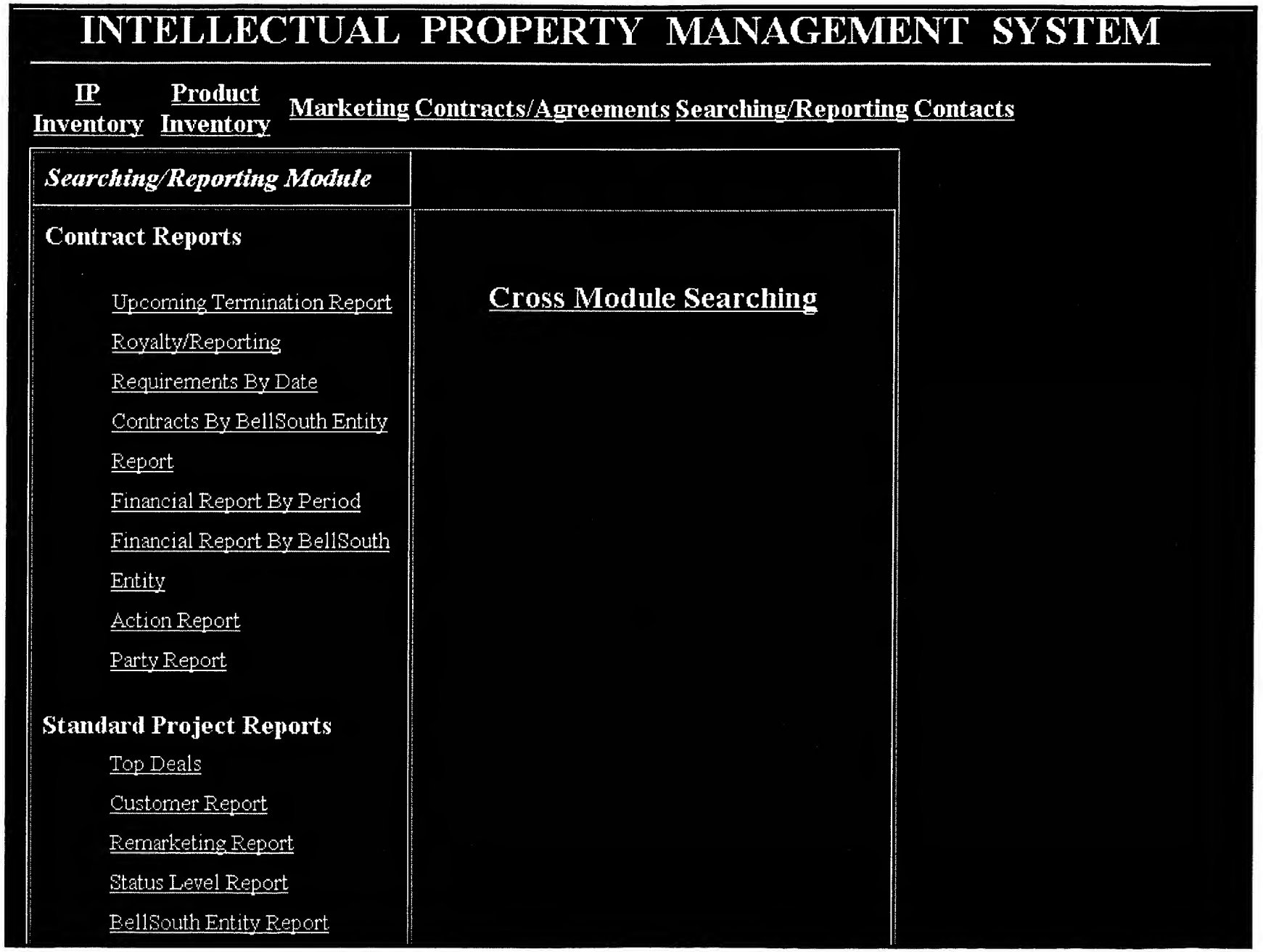

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Searching/Reporting Module
Contract Reports
Upcoming Termination Report
Royalty/Reporting Requirements By Date
Contracts By BellSouth Entity Report
Financial Report By Period
Financial Report By BellSouth Entity
Action Report
Party Report
Standard Project Reports
Top Deals
Customer Report
Remarketing Report
Status Level Report
BellSouth Entity Report
Cross Module Searching

FIG. 151

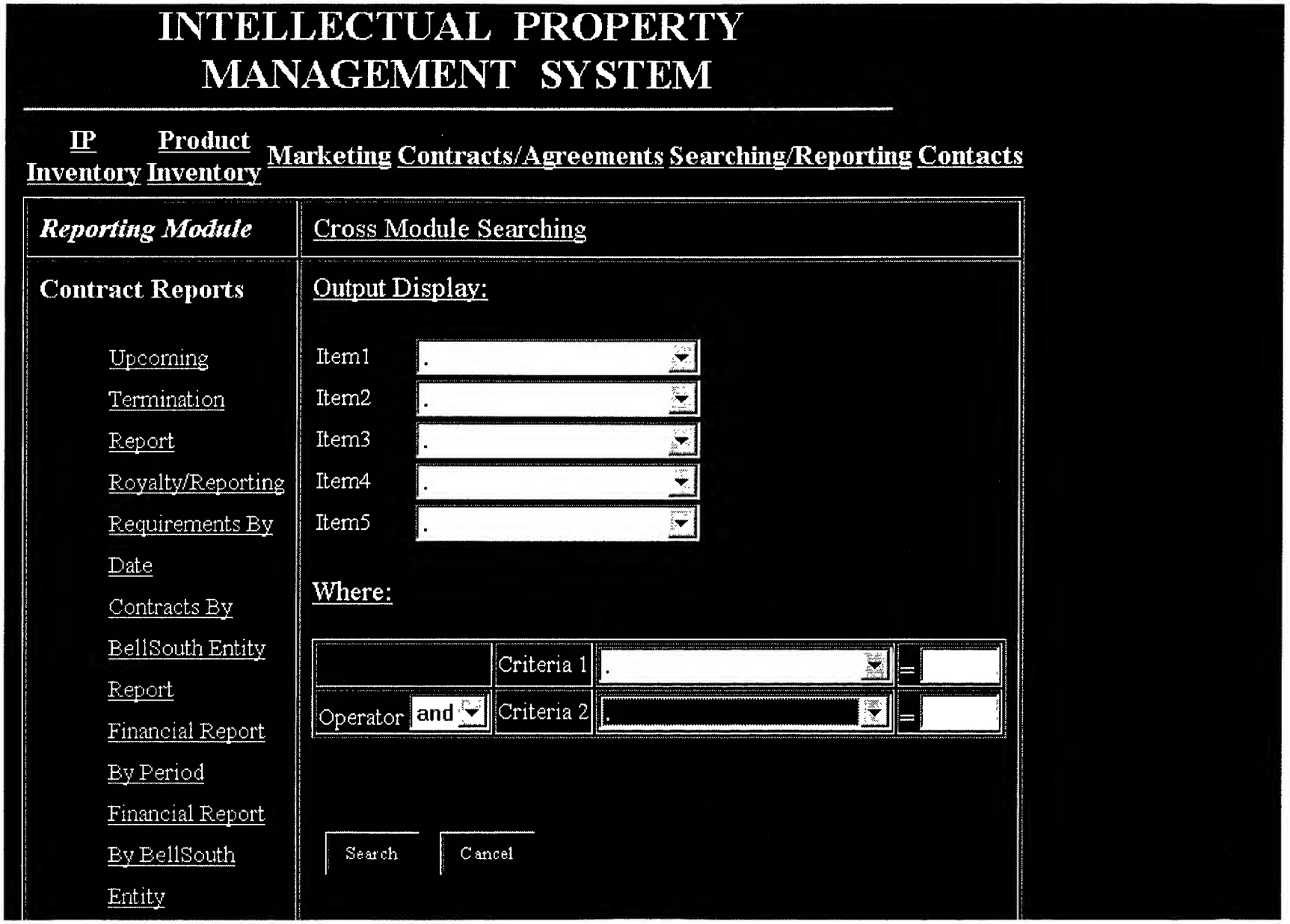

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Reporting Module
Cross Module Searching
Contract Reports
Upcoming Termination Report
Royalty/Reporting Requirements By Date
Contracts By BellSouth Entity Report
Financial Report By Period
Financial Report By BellSouth Entity
Output Display:
Item1
Item2
Item3
Item4
Item5
Where:
Criteria 1
Operator
and
Criteria 2
Search
Cancel

FIG. 152

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Reporting Module
Cross Module Searching
Contract Reports
Upcoming Termination Report
Royalty/Reporting Requirements By Date
Contracts By BellSouth Entity Report
Financial Report By Period
Financial Report By BellSouth Entity
Output Display:
Item1
Patents
Item2
Trademarks
Item3
Trade Secrets
Item4
Copyrights
Item5
Where:
Patents
Trademarks
Trade Secrets
Copyrights
Products
Marketing Opportunities
Contracts
Operator
Search
Cancel

FIG. 153

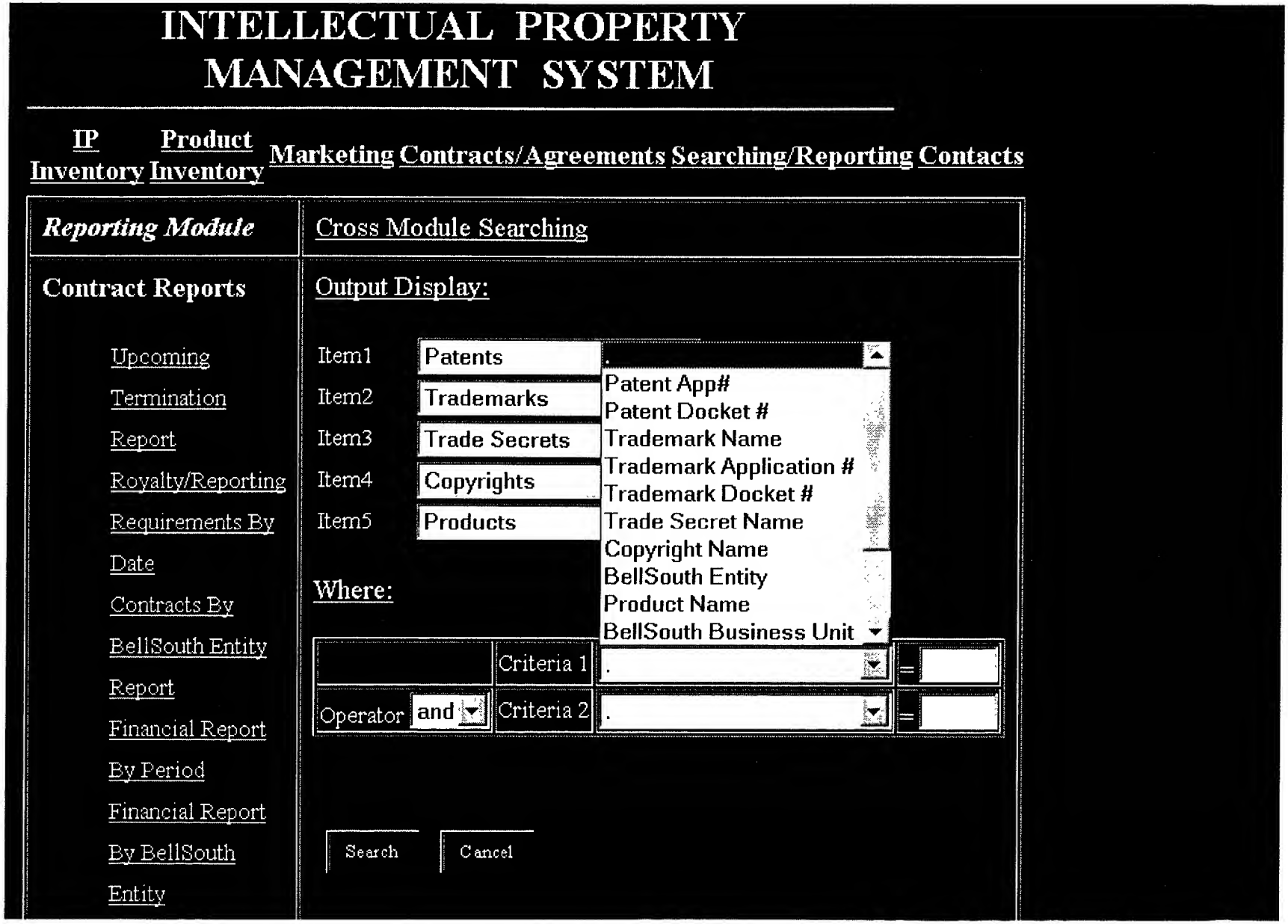

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Reporting Module
Cross Module Searching
Contract Reports
Upcoming Termination Report
Royalty/Reporting Requirements By Date
Contracts By BellSouth Entity Report
Financial Report By Period
Financial Report By BellSouth Entity
Output Display:
Item1 Patents
Item2 Trademarks
Item3 Trade Secrets
Item4 Copyrights
Item5 Products
Patent App#
Patent Docket #
Trademark Name
Trademark Application #
Trademark Docket #
Trade Secret Name
Copyright Name
BellSouth Entity
Product Name
BellSouth Business Unit
Where:
Criteria 1
Operator and
Criteria 2
Search
Cancel

FIG. 154

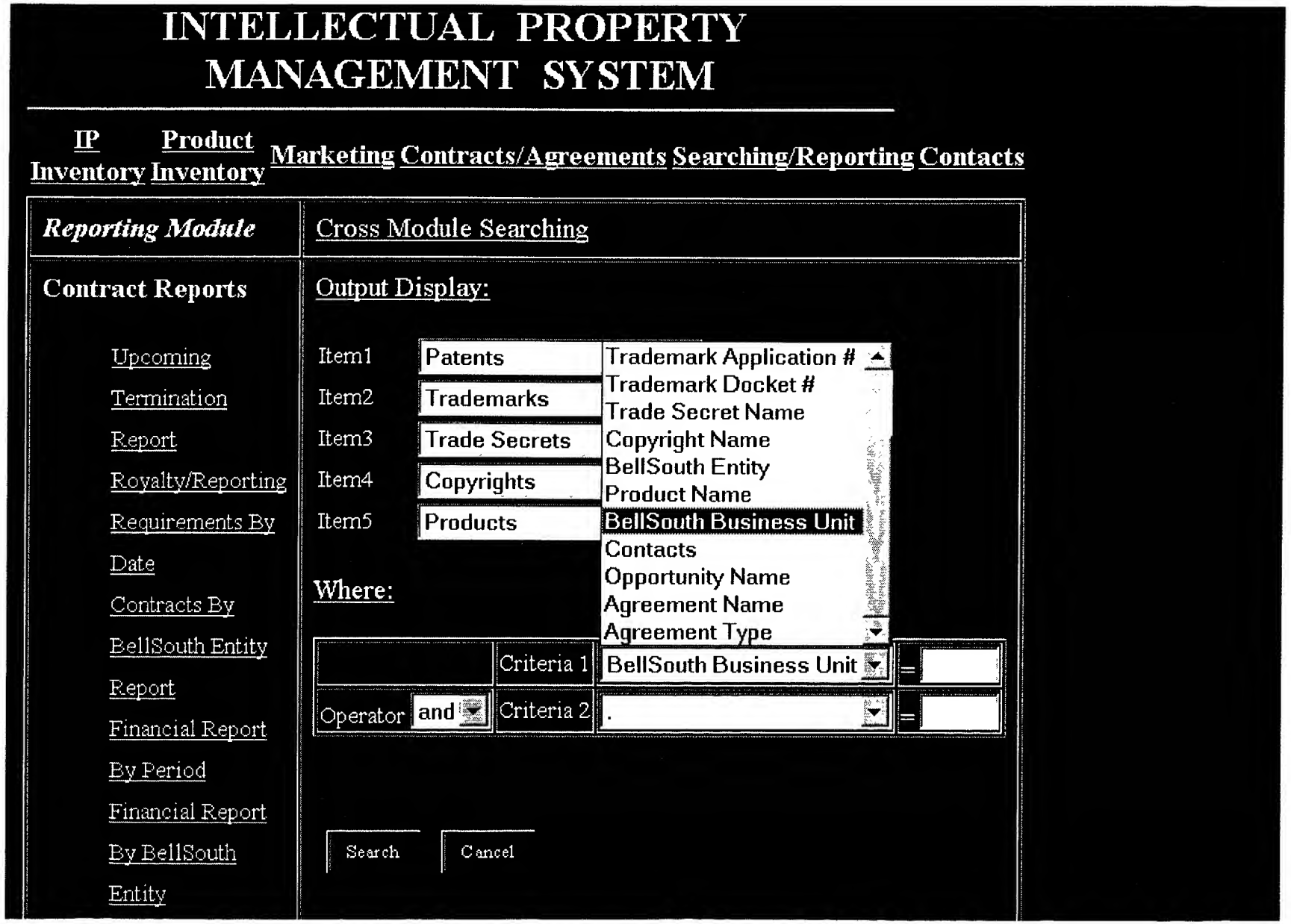

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Reporting Module
Cross Module Searching
Contract Reports
Upcoming Termination Report
Royalty/Reporting Requirements By Date
Contracts By BellSouth Entity Report
Financial Report By Period
Financial Report By BellSouth Entity
Output Display:
Item1
Patents
Item2
Trademarks
Item3
Trade Secrets
Item4
Copyrights
Item5
Products
Trademark Application #
Trademark Docket #
Trade Secret Name
Copyright Name
BellSouth Entity
Product Name
BellSouth Business Unit
Contacts
Opportunity Name
Agreement Name
Agreement Type
Where:
Criteria 1
BellSouth Business Unit
Operator
and
Criteria 2
Search
Cancel

FIG. 155

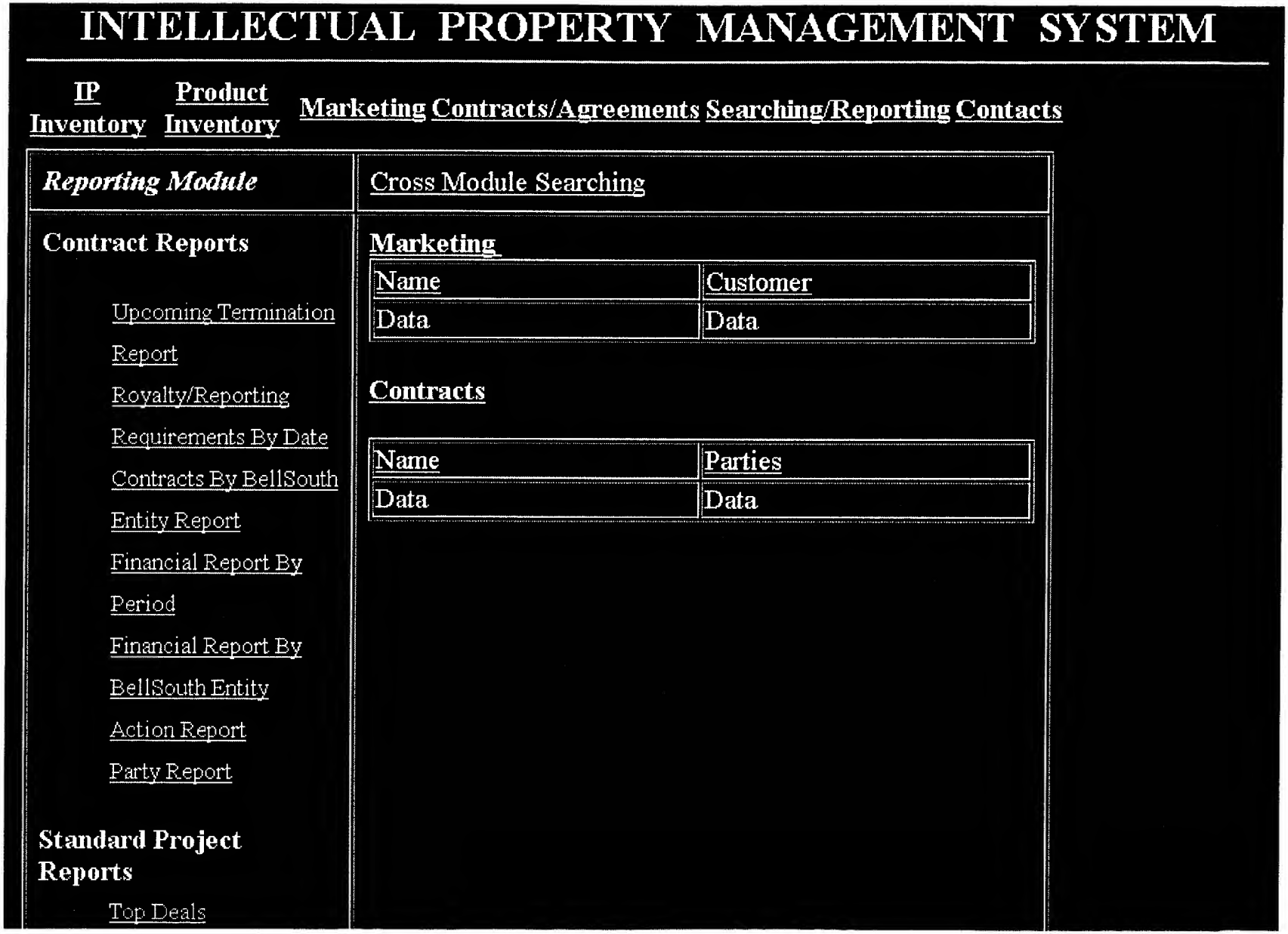

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Reporting Module
Cross Module Searching
Contract Reports
Upcoming Termination Report
Royalty/Reporting Requirements By Date
Contracts By BellSouth Entity Report
Financial Report By Period
Financial Report By BellSouth Entity
Action Report
Party Report
Standard Project Reports
Top Deals
Marketing
Name
Customer
Data
Data
Contracts
Name
Parties
Data
Data

FIG. 156

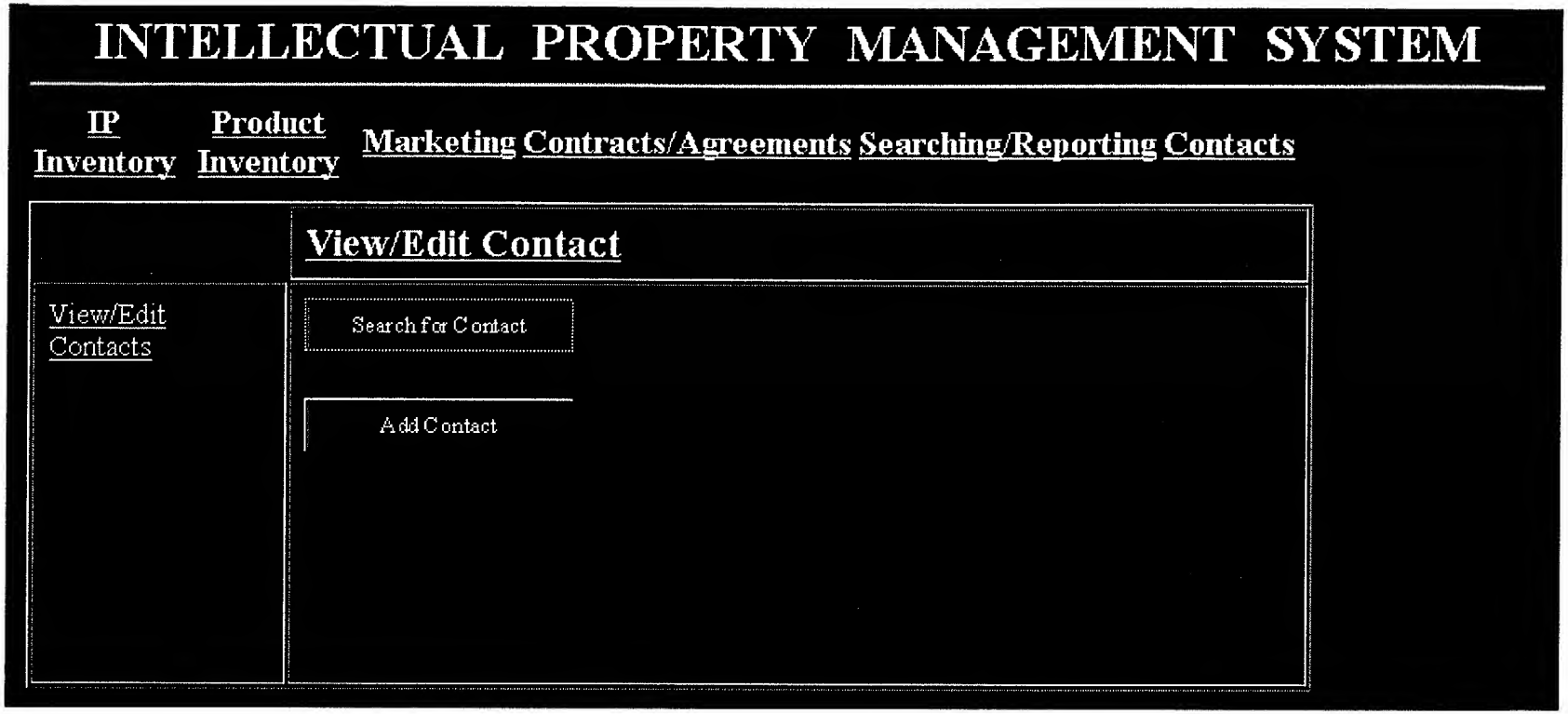

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
View/Edit Contact
View/Edit Contacts
Search for Contact
Add Contact

FIG. 157

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Search for Contacts
Create Contacts
View/Edit Contacts
Company Name
BellSouth Sub-entity
Type
N/A
Events
Date
Comments
Attached Files
Add Event
Remove Event
Contacts

FIG. 158

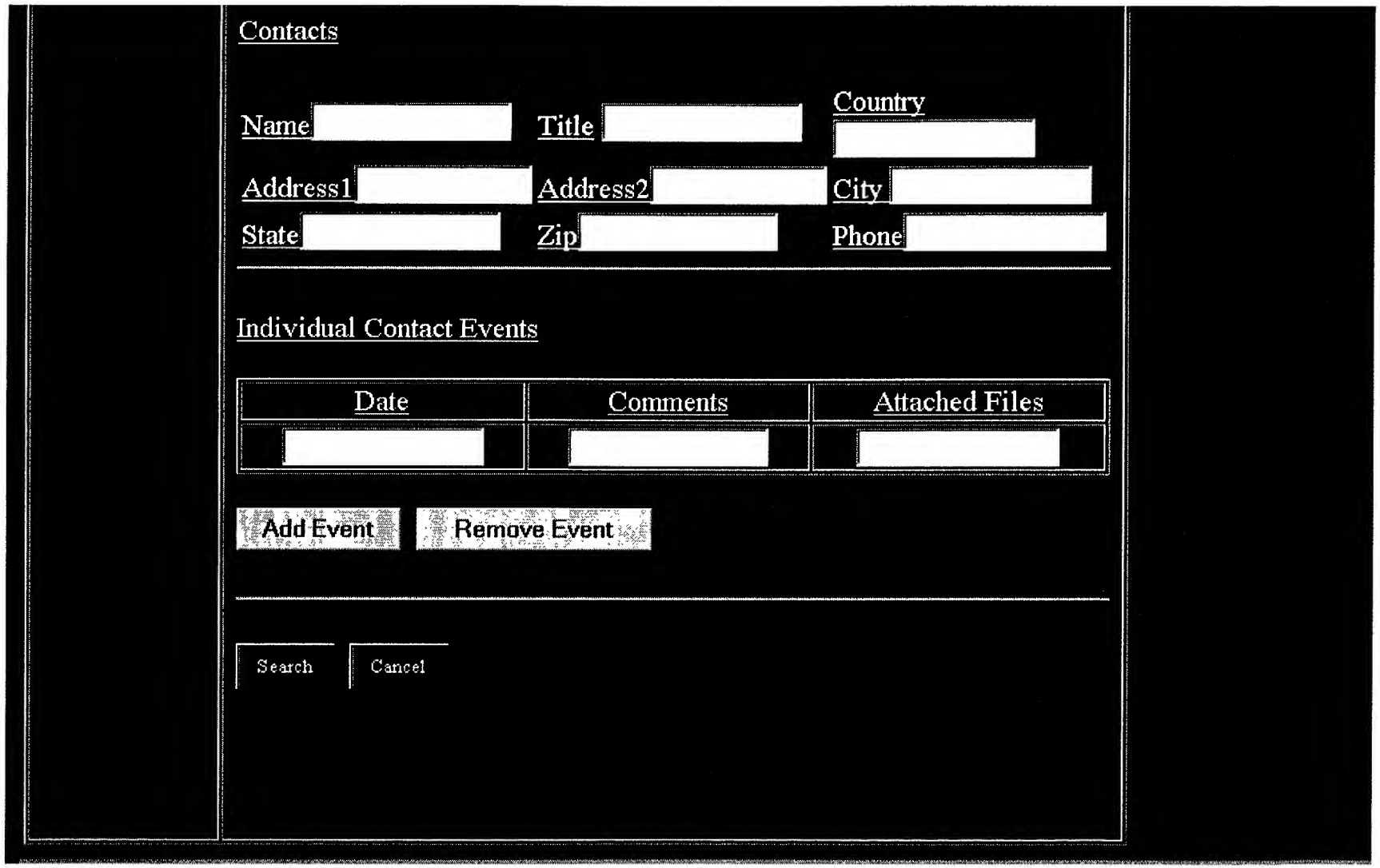

Contacts
Name
Title
Country
Address1
Address2
City
State
Zip
Phone
Individual Contact Events
Date
Comments
Attached Files
Add Event
Remove Event
Search
Cancel

FIG. 159

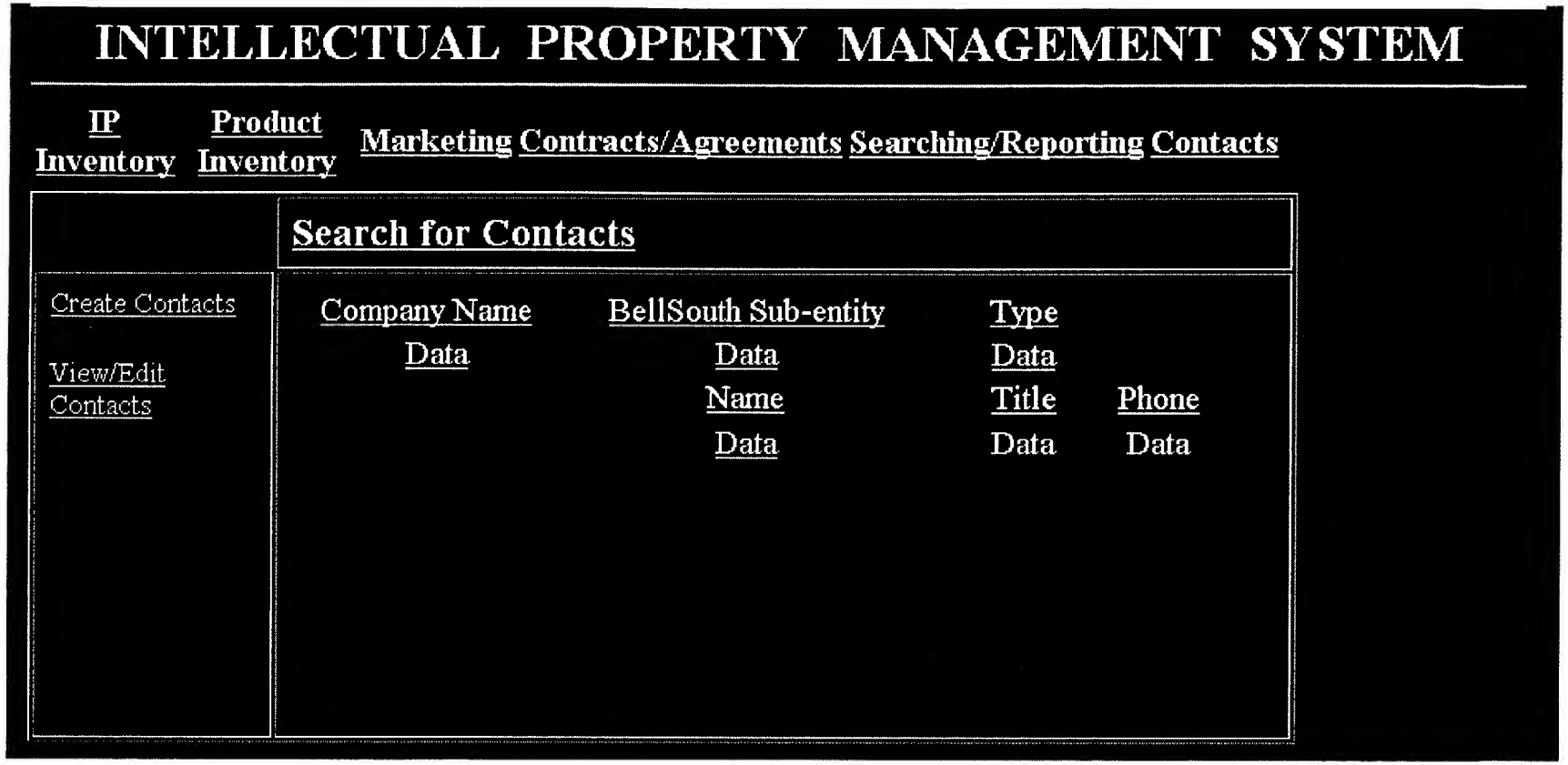

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Search for Contacts
Create Contacts
View/Edit Contacts
Company Name
Data
BellSouth Sub-entity
Data
Name
Data
Type
Data
Title
Data
Phone
Data

FIG. 160

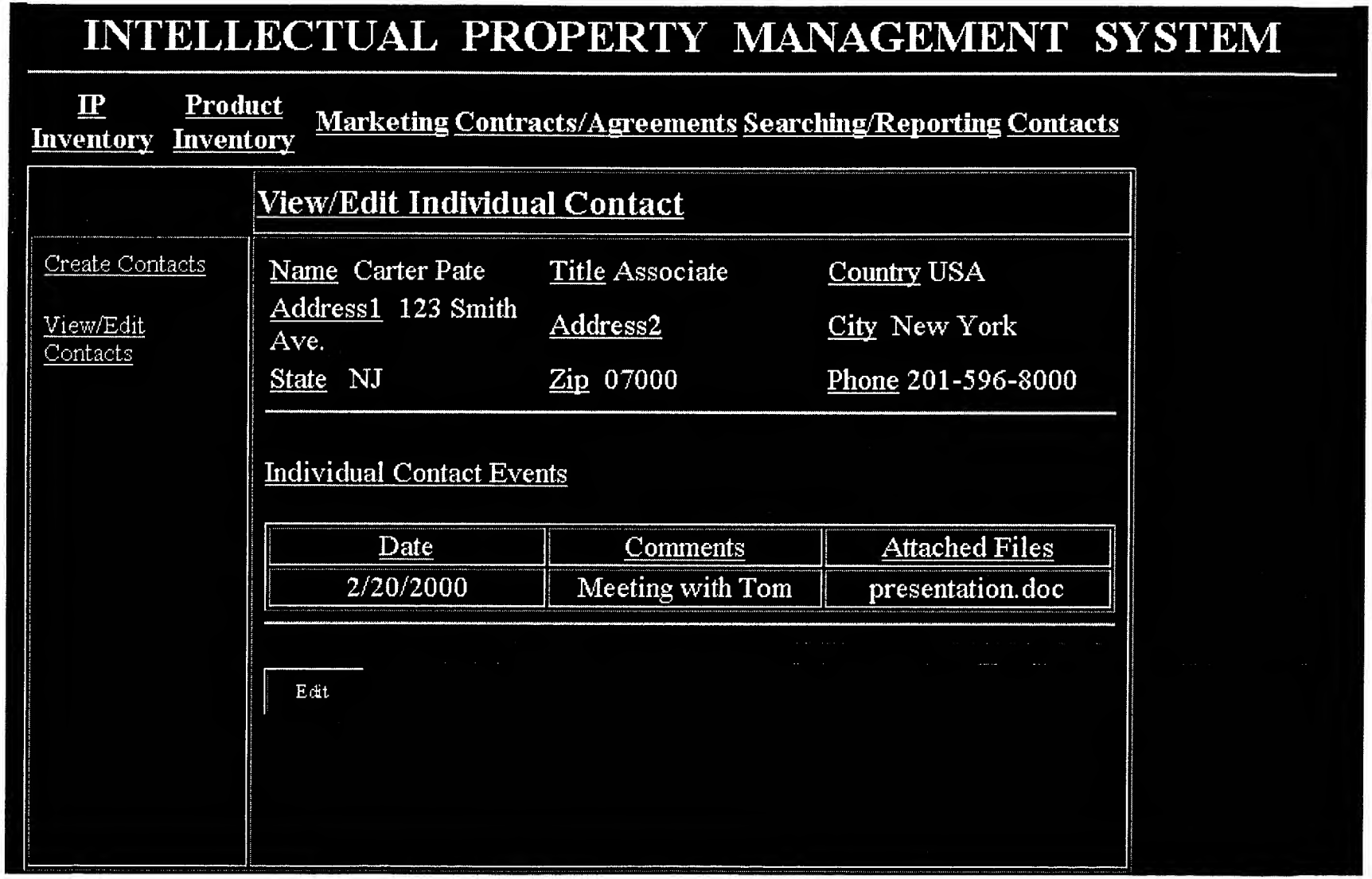

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Create Contacts
View/Edit Contacts
View/Edit Individual Contact
Name Carter Pate
Title Associate
Country USA
Address1 123 Smith Ave.
Address2
City New York
State NJ
Zip 07000
Phone 201-596-8000
Individual Contact Events
Date
Comments
Attached Files
2/20/2000
Meeting with Tom
presentation.doc
Edit

FIG. 161

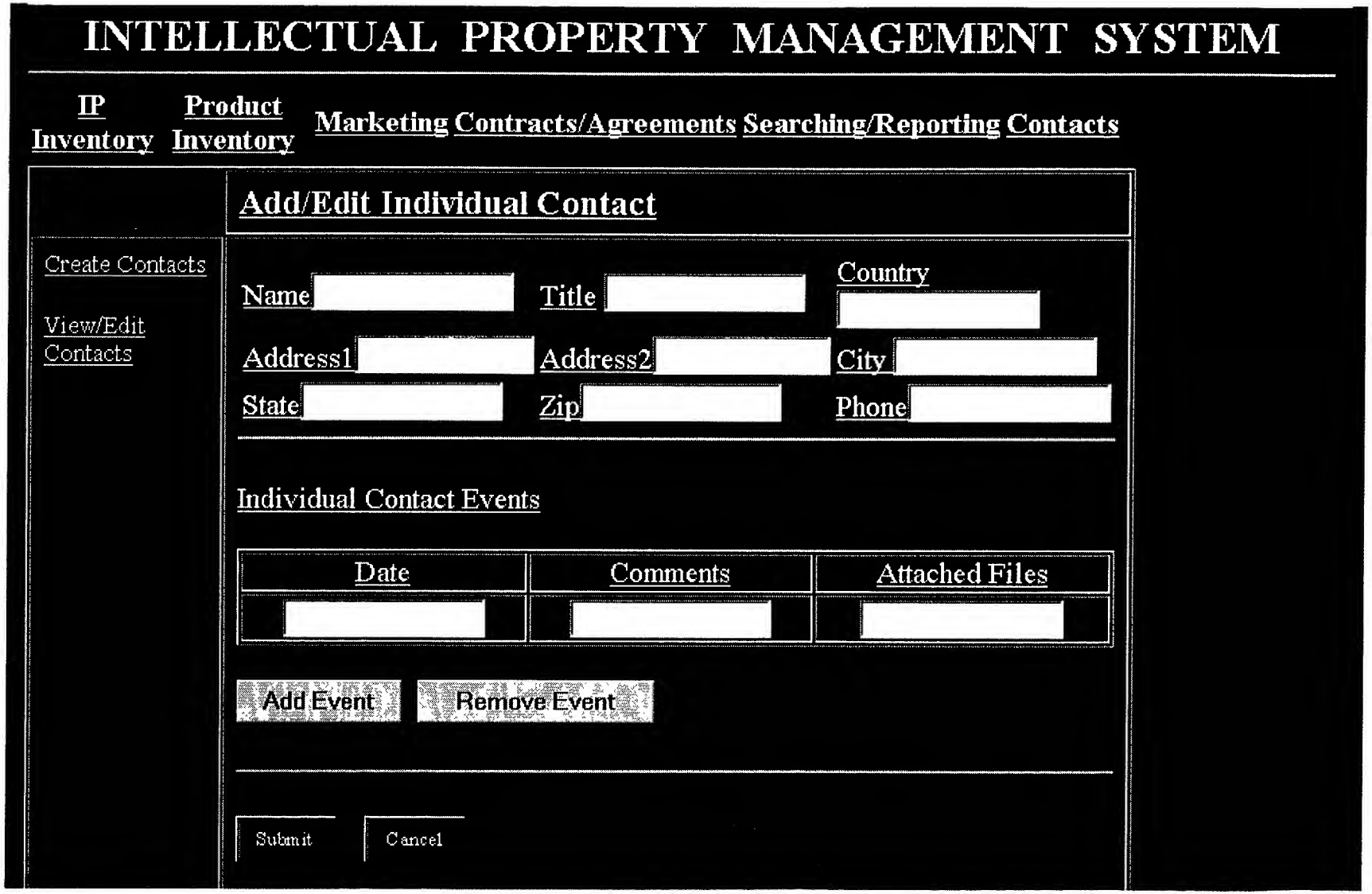

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Add/Edit Individual Contact
Create Contacts
View/Edit Contacts
Name
Title
Country
Address1
Address2
City
State
Zip
Phone
Individual Contact Events
Date
Comments
Attached Files
Add Event
Remove Event
Submit
Cancel

FIG. 162

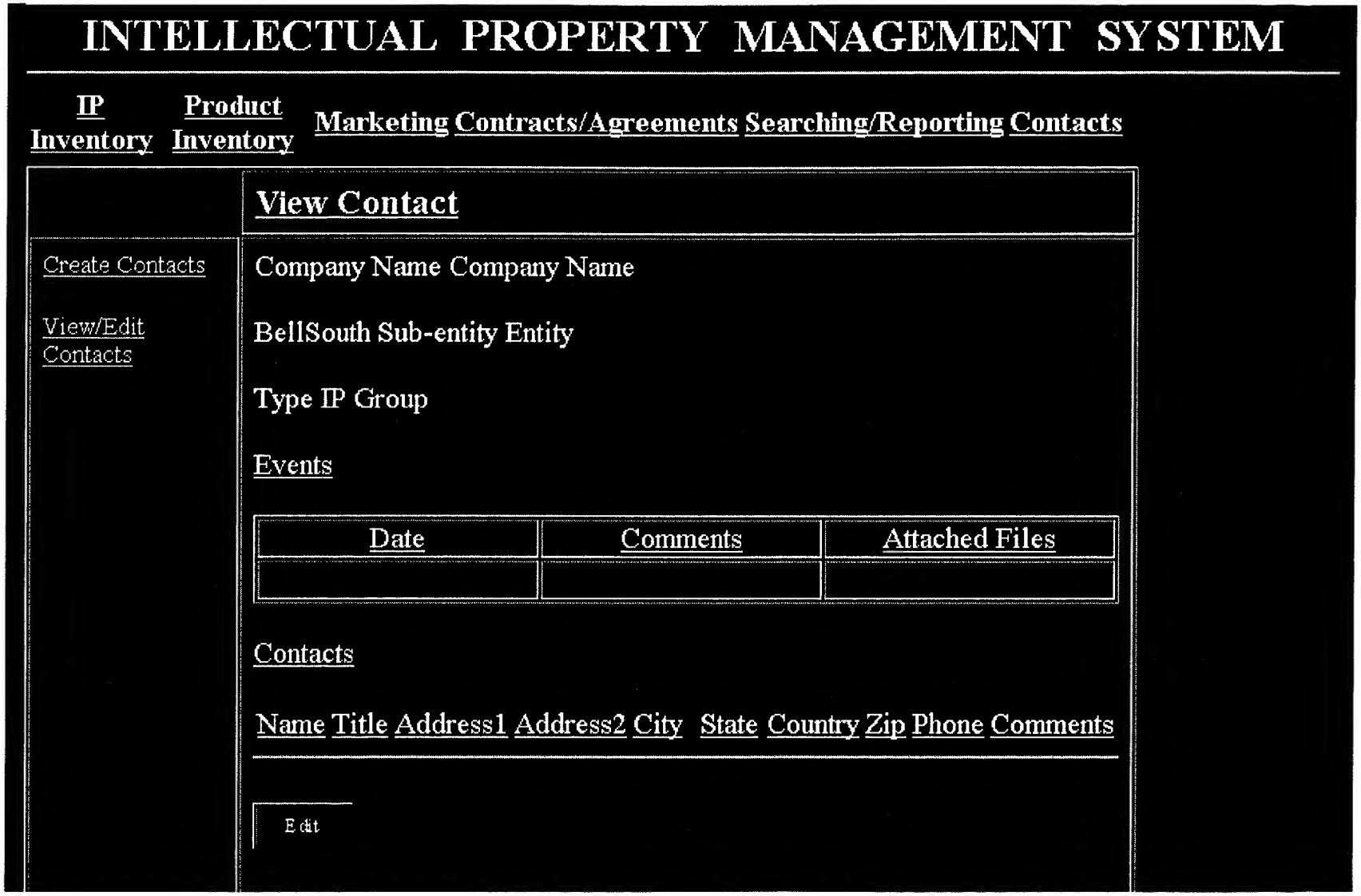

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
View Contact
Create Contacts
View/Edit Contacts
Company Name Company Name
BellSouth Sub-entity Entity
Type IP Group
Events
Date
Comments
Attached Files
Contacts
Name Title Address1 Address2 City State Country Zip Phone Comments
Edit

FIG. 163

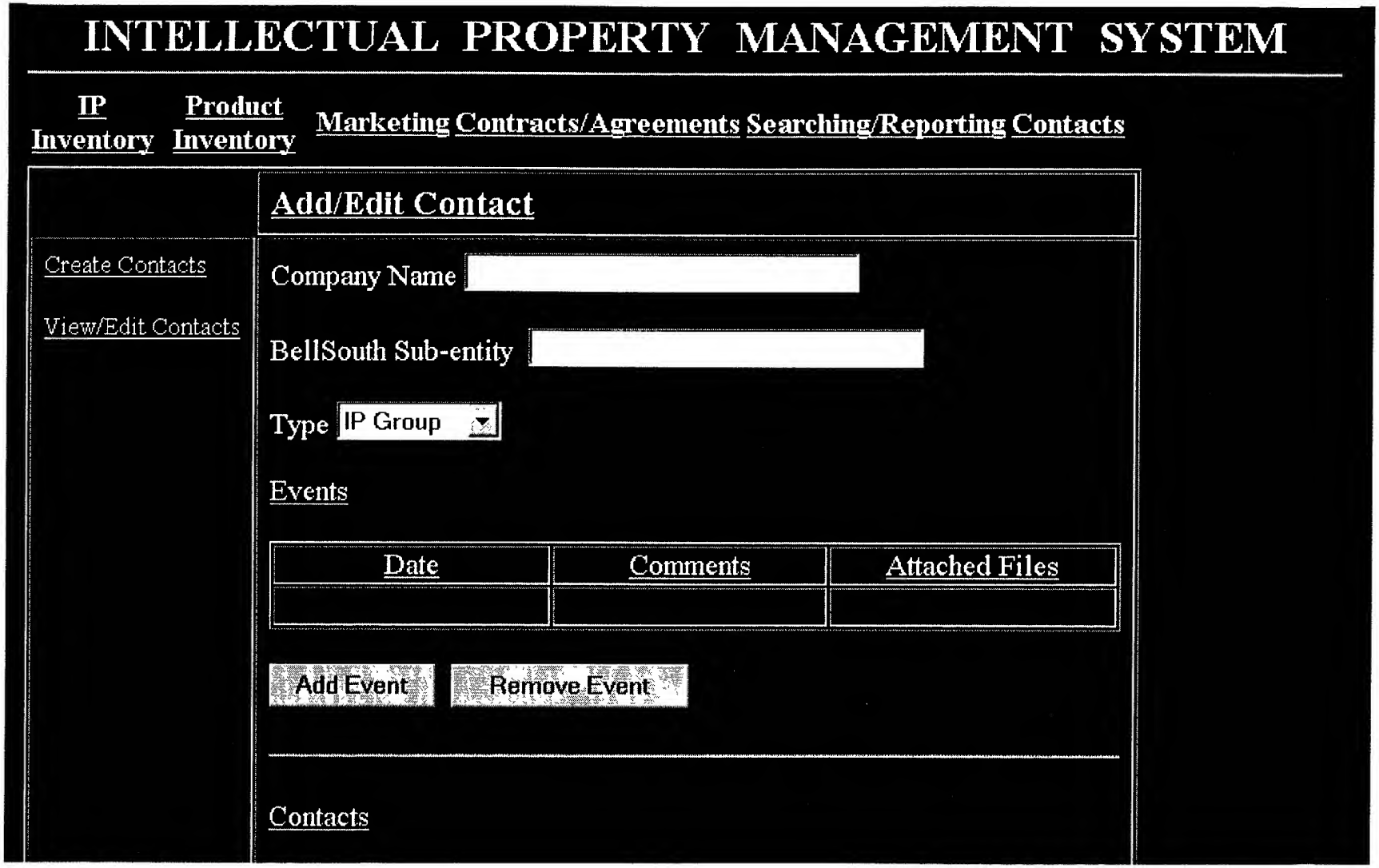

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM
IP Inventory
Product Inventory
Marketing
Contracts/Agreements
Searching/Reporting
Contacts
Add/Edit Contact
Create Contacts
View/Edit Contacts
Company Name
BellSouth Sub-entity
Type
IP Group
Events
Date
Comments
Attached Files
Add Event
Remove Event
Contacts

FIG. 164

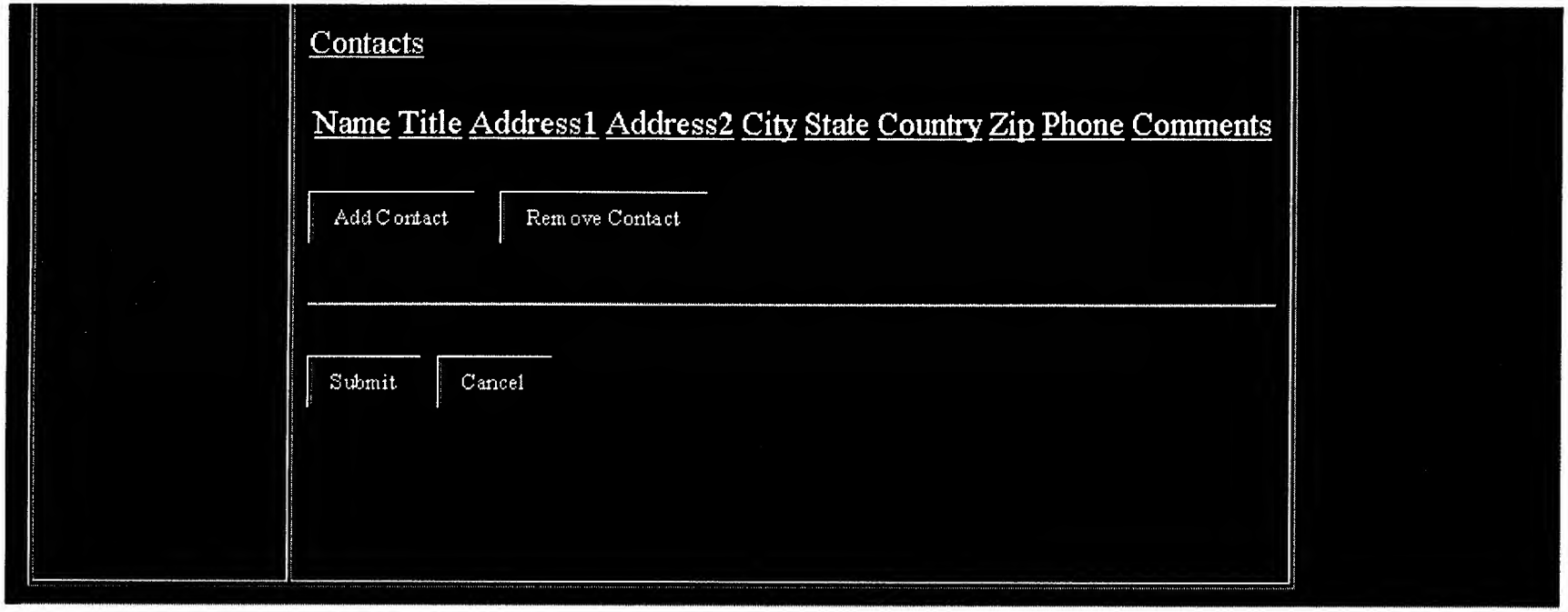

Contacts
Name Title Address1 Address2 City State Country Zip Phone Comments
Add Contact
Remove Contact
Submit
Cancel

FIG. 165

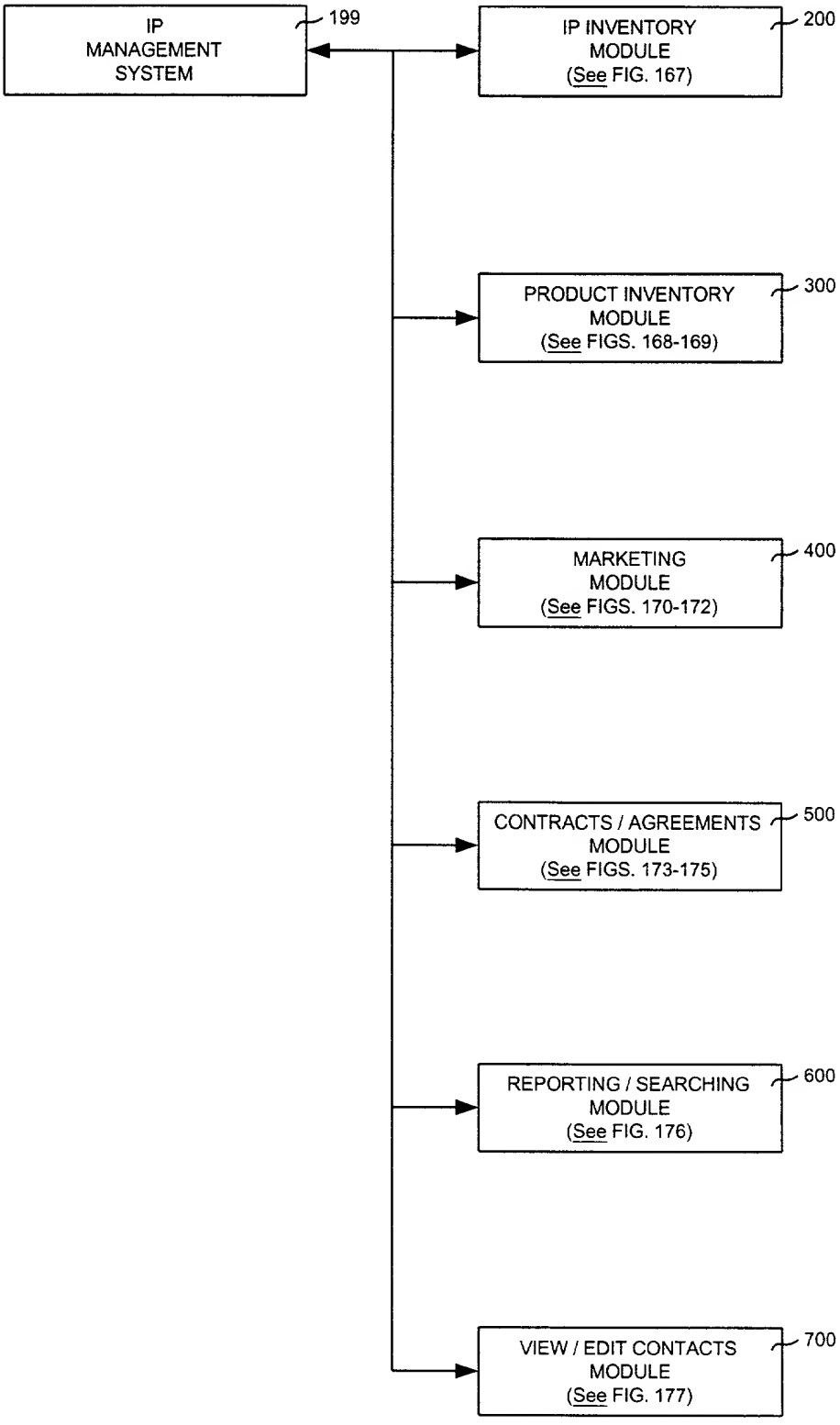

IP MANAGEMENT SYSTEM
199
IP INVENTORY MODULE (See FIG. 167)
200
PRODUCT INVENTORY MODULE (See FIGS. 168-169)
300
MARKETING MODULE (See FIGS. 170-172)
400
CONTRACTS / AGREEMENTS MODULE (See FIGS. 173-175)
500
REPORTING / SEARCHING MODULE (See FIG. 176)
600
VIEW / EDIT CONTACTS MODULE (See FIG. 177)
700

FIG. 166

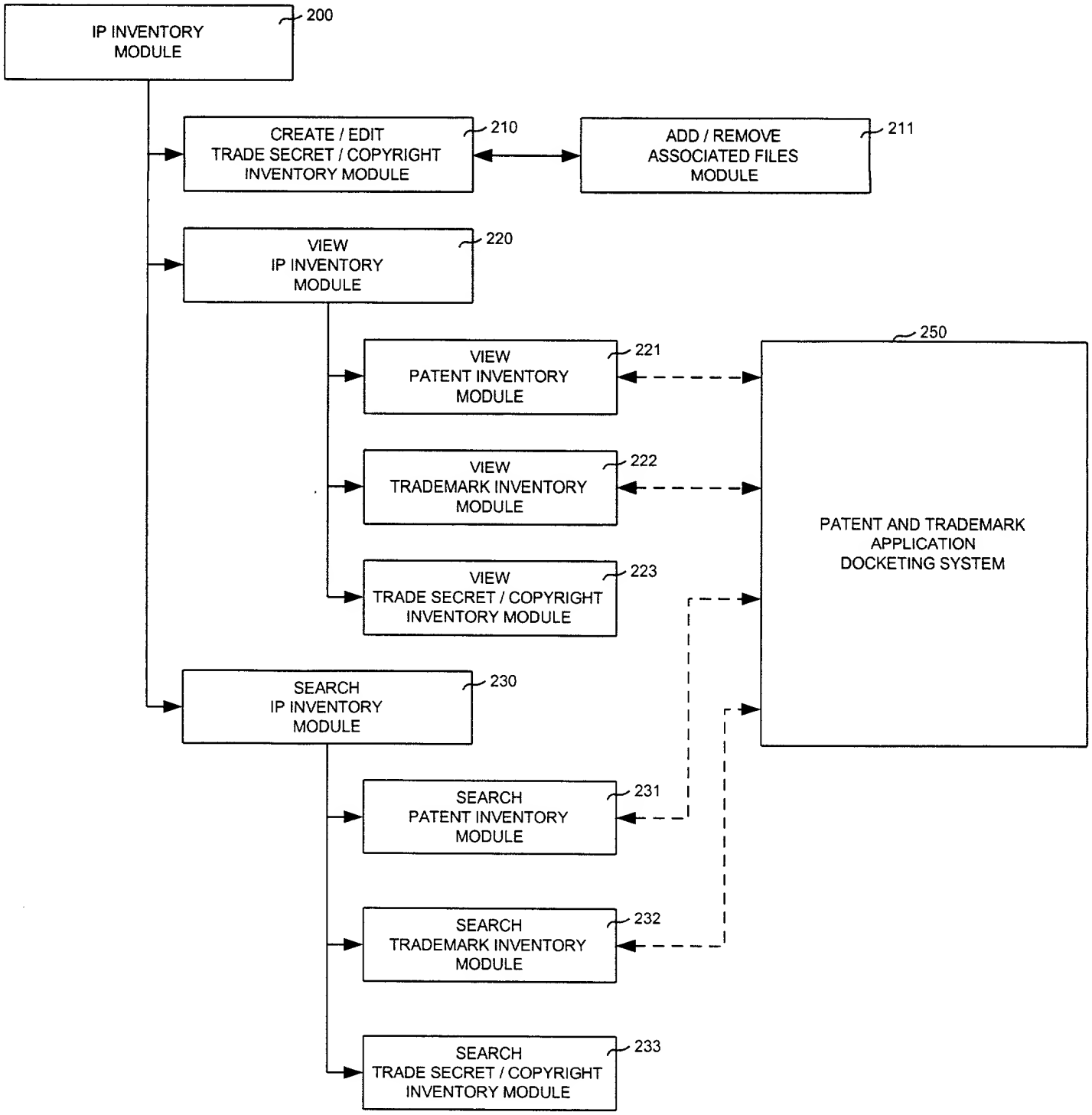

IP INVENTORY MODULE
200
CREATE / EDIT TRADE SECRET / COPYRIGHT INVENTORY MODULE
210
ADD / REMOVE ASSOCIATED FILES MODULE
211
VIEW IP INVENTORY MODULE
220
VIEW PATENT INVENTORY MODULE
221
VIEW TRADEMARK INVENTORY MODULE
222
VIEW TRADE SECRET / COPYRIGHT INVENTORY MODULE
223
250
PATENT AND TRADEMARK APPLICATION DOCKETING SYSTEM
SEARCH IP INVENTORY MODULE
230
SEARCH PATENT INVENTORY MODULE
231
SEARCH TRADEMARK INVENTORY MODULE
232
SEARCH TRADE SECRET / COPYRIGHT INVENTORY MODULE
233

FIG. 167

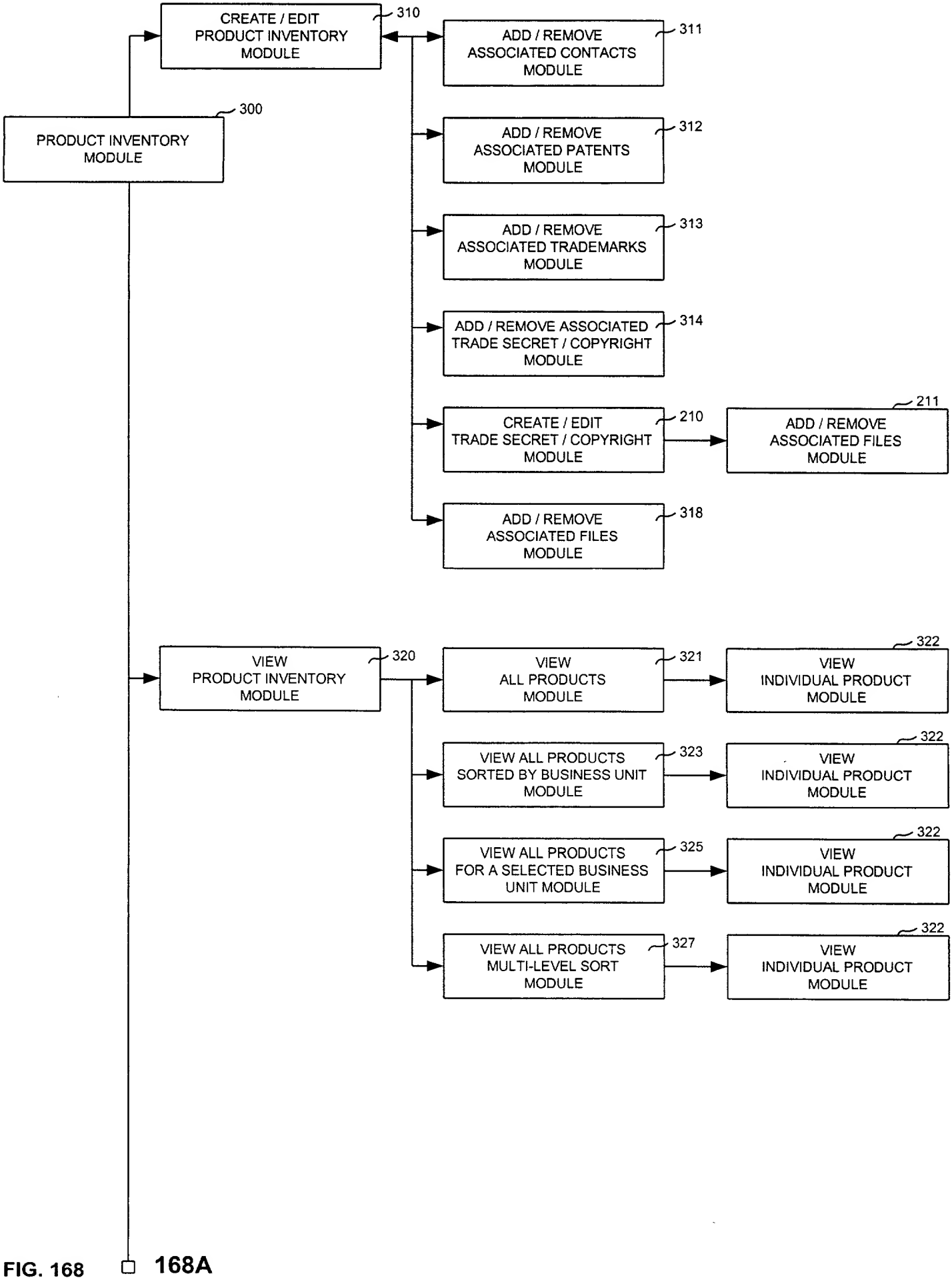

PRODUCT INVENTORY MODULE
300
CREATE / EDIT PRODUCT INVENTORY MODULE
310
ADD / REMOVE ASSOCIATED CONTACTS MODULE
311
ADD / REMOVE ASSOCIATED PATENTS MODULE
312
ADD / REMOVE ASSOCIATED TRADEMARKS MODULE
313
ADD / REMOVE ASSOCIATED TRADE SECRET / COPYRIGHT MODULE
314
CREATE / EDIT TRADE SECRET / COPYRIGHT MODULE
210
ADD / REMOVE ASSOCIATED FILES MODULE
211
ADD / REMOVE ASSOCIATED FILES MODULE
318
VIEW PRODUCT INVENTORY MODULE
320
VIEW ALL PRODUCTS MODULE
321
VIEW INDIVIDUAL PRODUCT MODULE
322
VIEW ALL PRODUCTS SORTED BY BUSINESS UNIT MODULE
323
VIEW INDIVIDUAL PRODUCT MODULE
322
VIEW ALL PRODUCTS FOR A SELECTED BUSINESS UNIT MODULE
325
VIEW INDIVIDUAL PRODUCT MODULE
322
VIEW ALL PRODUCTS MULTI-LEVEL SORT MODULE
327
VIEW INDIVIDUAL PRODUCT MODULE
322
168A

FIG. 168

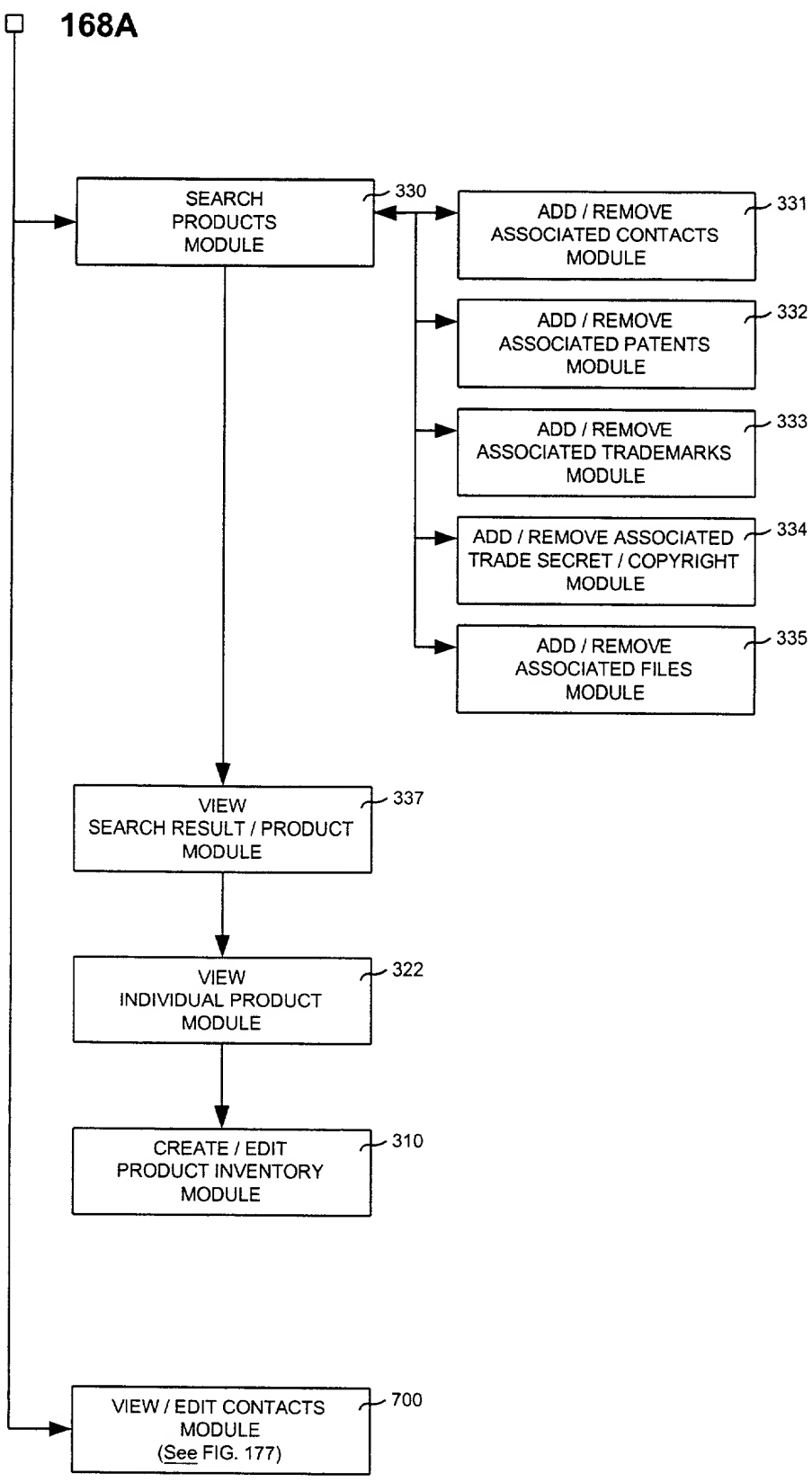

168A
SEARCH PRODUCTS MODULE
330
ADD / REMOVE ASSOCIATED CONTACTS MODULE
331
ADD / REMOVE ASSOCIATED PATENTS MODULE
332
ADD / REMOVE ASSOCIATED TRADEMARKS MODULE
333
ADD / REMOVE ASSOCIATED TRADE SECRET / COPYRIGHT MODULE
334
ADD / REMOVE ASSOCIATED FILES MODULE
335
VIEW SEARCH RESULT / PRODUCT MODULE
337
VIEW INDIVIDUAL PRODUCT MODULE
322
CREATE / EDIT PRODUCT INVENTORY MODULE
310
VIEW / EDIT CONTACTS MODULE
(See FIG. 177)
700

FIG. 169

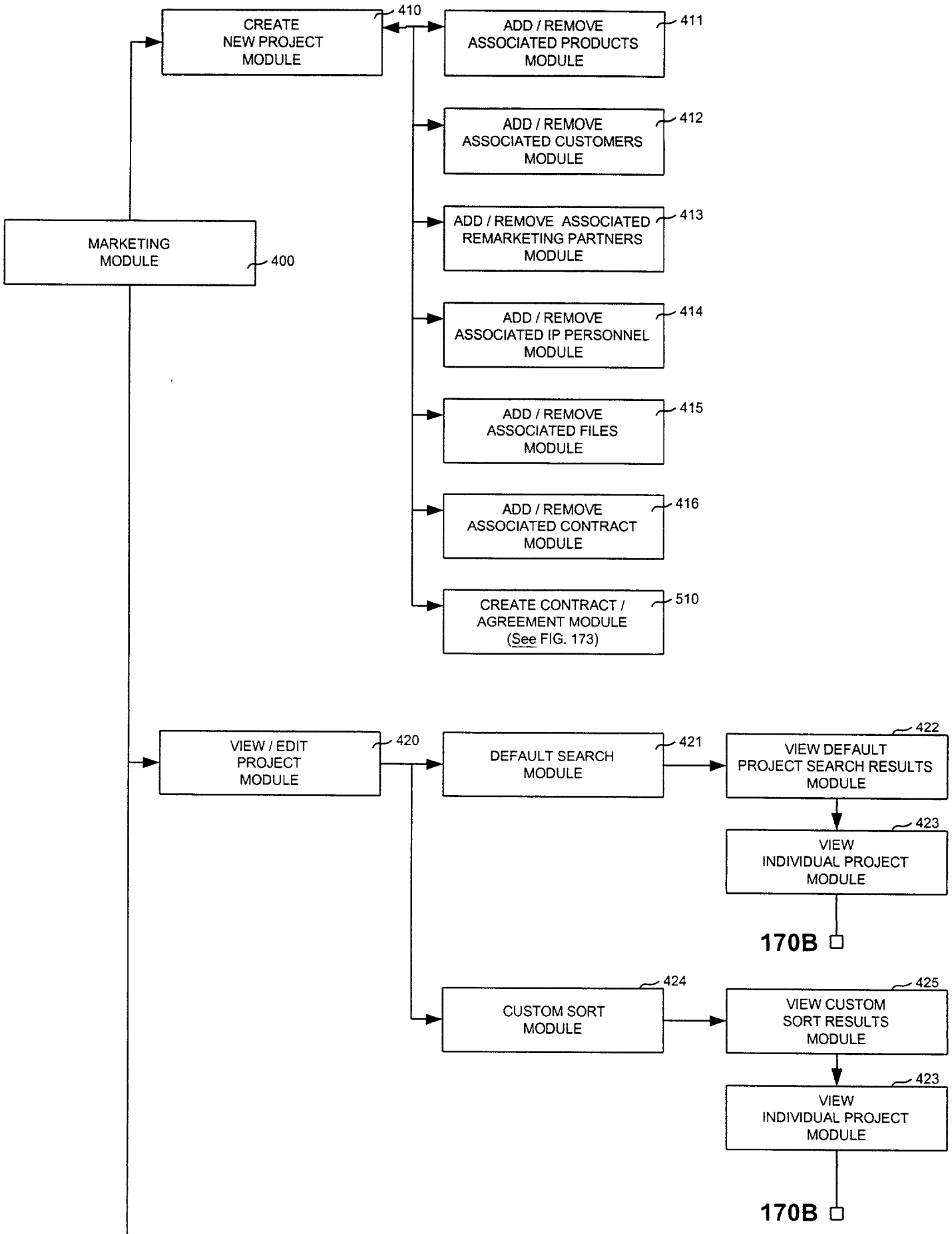

MARKETING MODULE
400
CREATE NEW PROJECT MODULE
410
ADD / REMOVE ASSOCIATED PRODUCTS MODULE
411
ADD / REMOVE ASSOCIATED CUSTOMERS MODULE
412
ADD / REMOVE ASSOCIATED REMARKETING PARTNERS MODULE
413
ADD / REMOVE ASSOCIATED IP PERSONNEL MODULE
414
ADD / REMOVE ASSOCIATED FILES MODULE
415
ADD / REMOVE ASSOCIATED CONTRACT MODULE
416
CREATE CONTRACT / AGREEMENT MODULE (See FIG. 173)
510
VIEW / EDIT PROJECT MODULE
420
DEFAULT SEARCH MODULE
421
VIEW DEFAULT PROJECT SEARCH RESULTS MODULE
422
VIEW INDIVIDUAL PROJECT MODULE
423
170B
CUSTOM SORT MODULE
424
VIEW CUSTOM SORT RESULTS MODULE
425
VIEW INDIVIDUAL PROJECT MODULE
423
170B
170A

FIG. 170

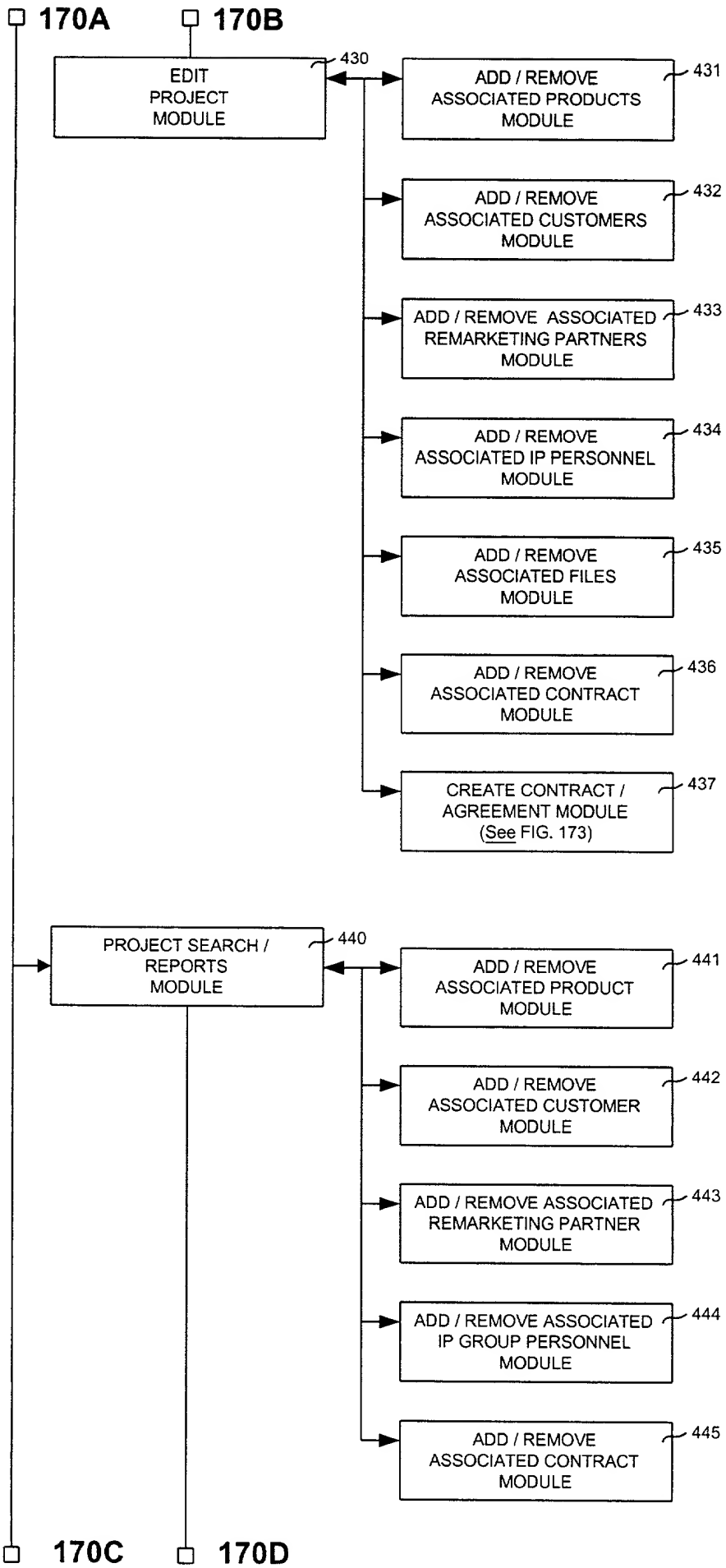

170A
170B
EDIT PROJECT MODULE
430
ADD / REMOVE ASSOCIATED PRODUCTS MODULE
431
ADD / REMOVE ASSOCIATED CUSTOMERS MODULE
432
ADD / REMOVE ASSOCIATED REMARKETING PARTNERS MODULE
433
ADD / REMOVE ASSOCIATED IP PERSONNEL MODULE
434
ADD / REMOVE ASSOCIATED FILES MODULE
435
ADD / REMOVE ASSOCIATED CONTRACT MODULE
436
CREATE CONTRACT / AGREEMENT MODULE (See FIG. 173)
437
PROJECT SEARCH / REPORTS MODULE
440
ADD / REMOVE ASSOCIATED PRODUCT MODULE
441
ADD / REMOVE ASSOCIATED CUSTOMER MODULE
442
ADD / REMOVE ASSOCIATED REMARKETING PARTNER MODULE
443
ADD / REMOVE ASSOCIATED IP GROUP PERSONNEL MODULE
444
ADD / REMOVE ASSOCIATED CONTRACT MODULE
445
170C
170D

FIG. 171

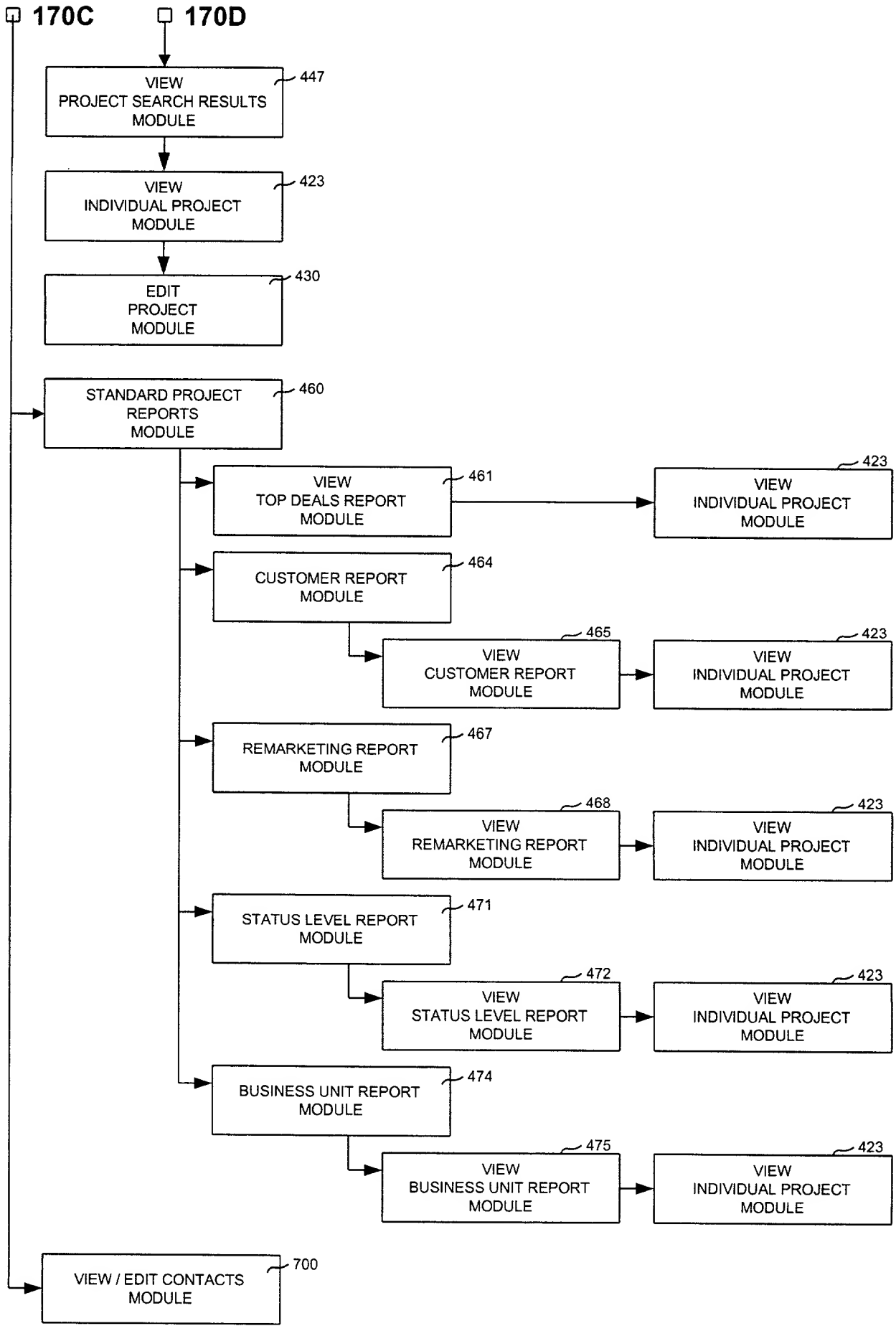

170C
170D
VIEW PROJECT SEARCH RESULTS MODULE
447
VIEW INDIVIDUAL PROJECT MODULE
423
EDIT PROJECT MODULE
430
STANDARD PROJECT REPORTS MODULE
460
VIEW TOP DEALS REPORT MODULE
461
423
VIEW INDIVIDUAL PROJECT MODULE
CUSTOMER REPORT MODULE
464
VIEW CUSTOMER REPORT MODULE
465
423
VIEW INDIVIDUAL PROJECT MODULE
REMARKETING REPORT MODULE
467
VIEW REMARKETING REPORT MODULE
468
423
VIEW INDIVIDUAL PROJECT MODULE
STATUS LEVEL REPORT MODULE
471
VIEW STATUS LEVEL REPORT MODULE
472
423
VIEW INDIVIDUAL PROJECT MODULE
BUSINESS UNIT REPORT MODULE
474
VIEW BUSINESS UNIT REPORT MODULE
475
423
VIEW INDIVIDUAL PROJECT MODULE
VIEW / EDIT CONTACTS MODULE
700

FIG. 172

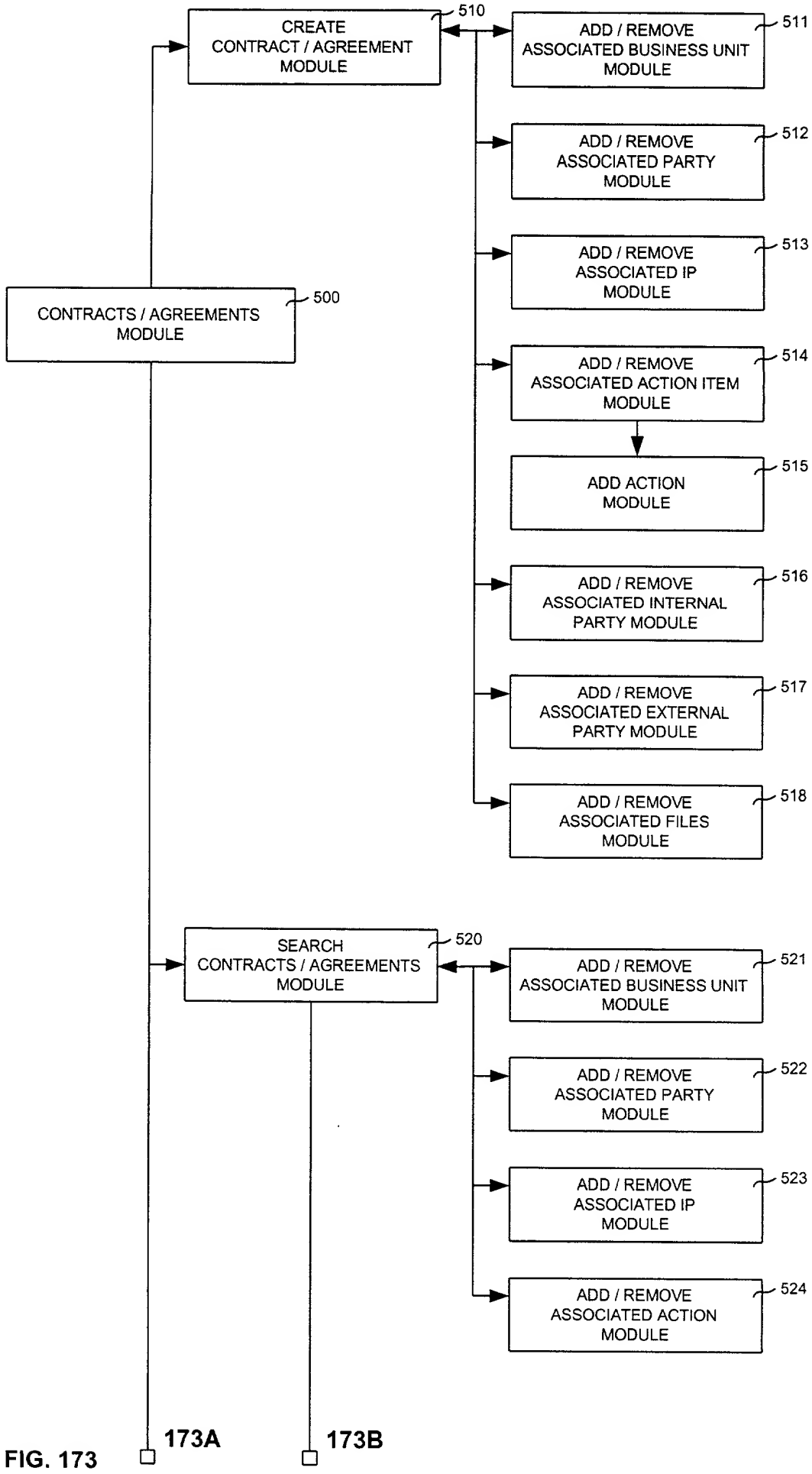

CONTRACTS / AGREEMENTS MODULE
500
CREATE CONTRACT / AGREEMENT MODULE
510
ADD / REMOVE ASSOCIATED BUSINESS UNIT MODULE
511
ADD / REMOVE ASSOCIATED PARTY MODULE
512
ADD / REMOVE ASSOCIATED IP MODULE
513
ADD / REMOVE ASSOCIATED ACTION ITEM MODULE
514
ADD ACTION MODULE
515
ADD / REMOVE ASSOCIATED INTERNAL PARTY MODULE
516
ADD / REMOVE ASSOCIATED EXTERNAL PARTY MODULE
517
ADD / REMOVE ASSOCIATED FILES MODULE
518
SEARCH CONTRACTS / AGREEMENTS MODULE
520
ADD / REMOVE ASSOCIATED BUSINESS UNIT MODULE
521
ADD / REMOVE ASSOCIATED PARTY MODULE
522
ADD / REMOVE ASSOCIATED IP MODULE
523
ADD / REMOVE ASSOCIATED ACTION MODULE
524
173A
173B

FIG. 173

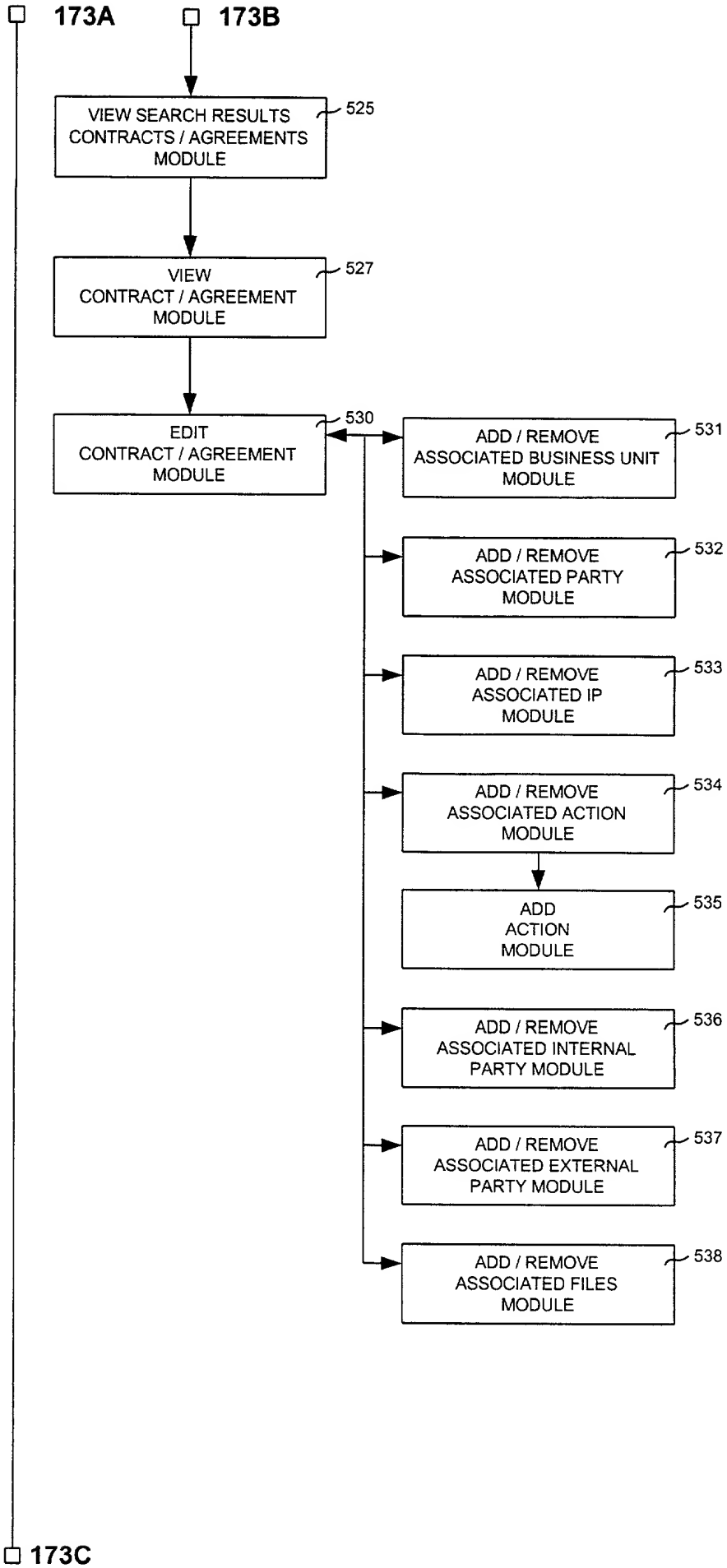

173A
173B
VIEW SEARCH RESULTS CONTRACTS / AGREEMENTS MODULE
525
VIEW CONTRACT / AGREEMENT MODULE
527
EDIT CONTRACT / AGREEMENT MODULE
530
ADD / REMOVE ASSOCIATED BUSINESS UNIT MODULE
531
ADD / REMOVE ASSOCIATED PARTY MODULE
532
ADD / REMOVE ASSOCIATED IP MODULE
533
ADD / REMOVE ASSOCIATED ACTION MODULE
534
ADD ACTION MODULE
535
ADD / REMOVE ASSOCIATED INTERNAL PARTY MODULE
536
ADD / REMOVE ASSOCIATED EXTERNAL PARTY MODULE
537
ADD / REMOVE ASSOCIATED FILES MODULE
538
173C

FIG. 174

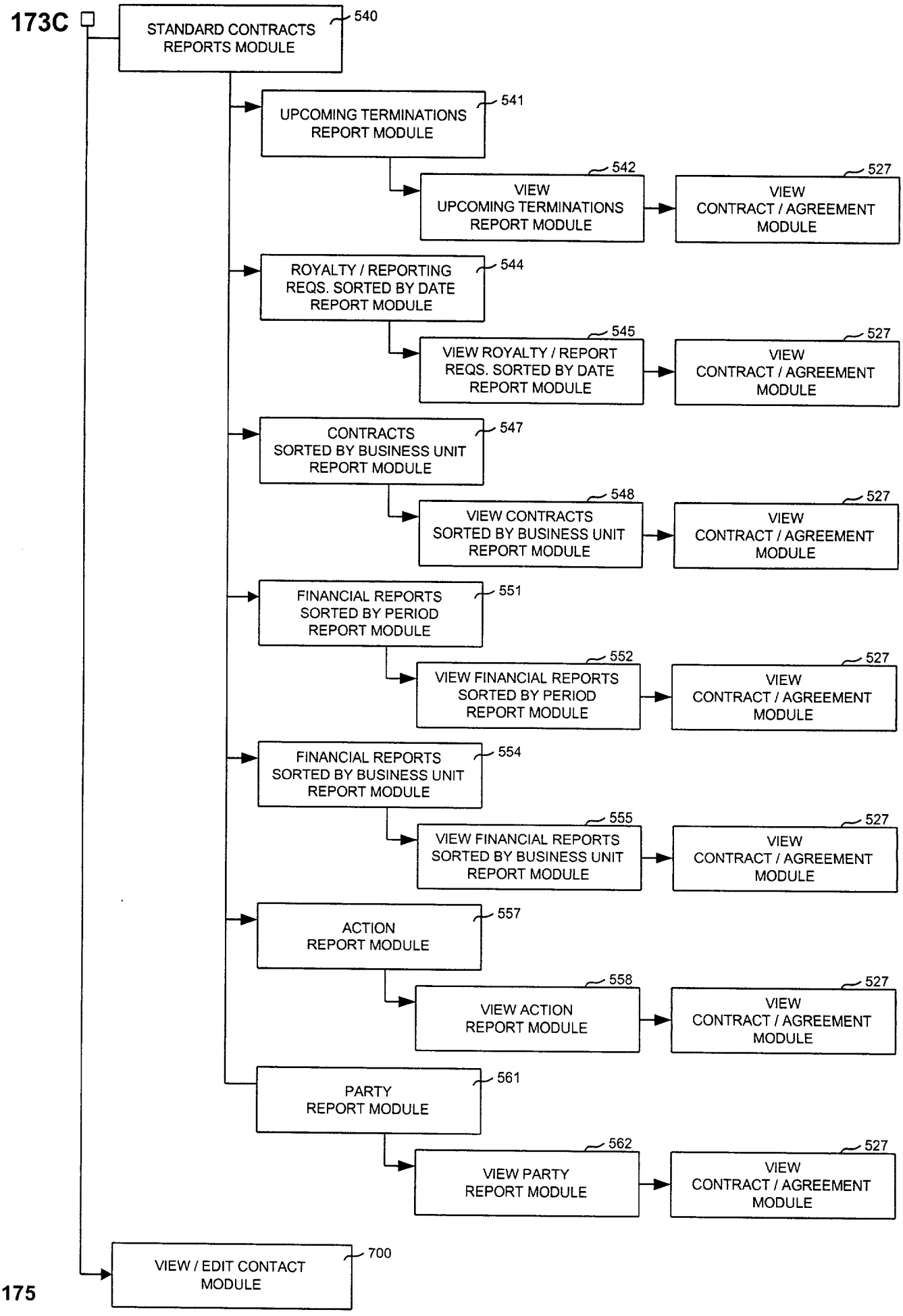

173C
STANDARD CONTRACTS REPORTS MODULE
540
UPCOMING TERMINATIONS REPORT MODULE
541
VIEW UPCOMING TERMINATIONS REPORT MODULE
542
VIEW CONTRACT / AGREEMENT MODULE
527
ROYALTY / REPORTING REQS. SORTED BY DATE REPORT MODULE
544
VIEW ROYALTY / REPORT REQS. SORTED BY DATE REPORT MODULE
545
VIEW CONTRACT / AGREEMENT MODULE
527
CONTRACTS SORTED BY BUSINESS UNIT REPORT MODULE
547
VIEW CONTRACTS SORTED BY BUSINESS UNIT REPORT MODULE
548
VIEW CONTRACT / AGREEMENT MODULE
527
FINANCIAL REPORTS SORTED BY PERIOD REPORT MODULE
551
VIEW FINANCIAL REPORTS SORTED BY PERIOD REPORT MODULE
552
VIEW CONTRACT / AGREEMENT MODULE
527
FINANCIAL REPORTS SORTED BY BUSINESS UNIT REPORT MODULE
554
VIEW FINANCIAL REPORTS SORTED BY BUSINESS UNIT REPORT MODULE
555
VIEW CONTRACT / AGREEMENT MODULE
527
ACTION REPORT MODULE
557
VIEW ACTION REPORT MODULE
558
VIEW CONTRACT / AGREEMENT MODULE
527
PARTY REPORT MODULE
561
VIEW PARTY REPORT MODULE
562
VIEW CONTRACT / AGREEMENT MODULE
527
VIEW / EDIT CONTACT MODULE
700

FIG. 175

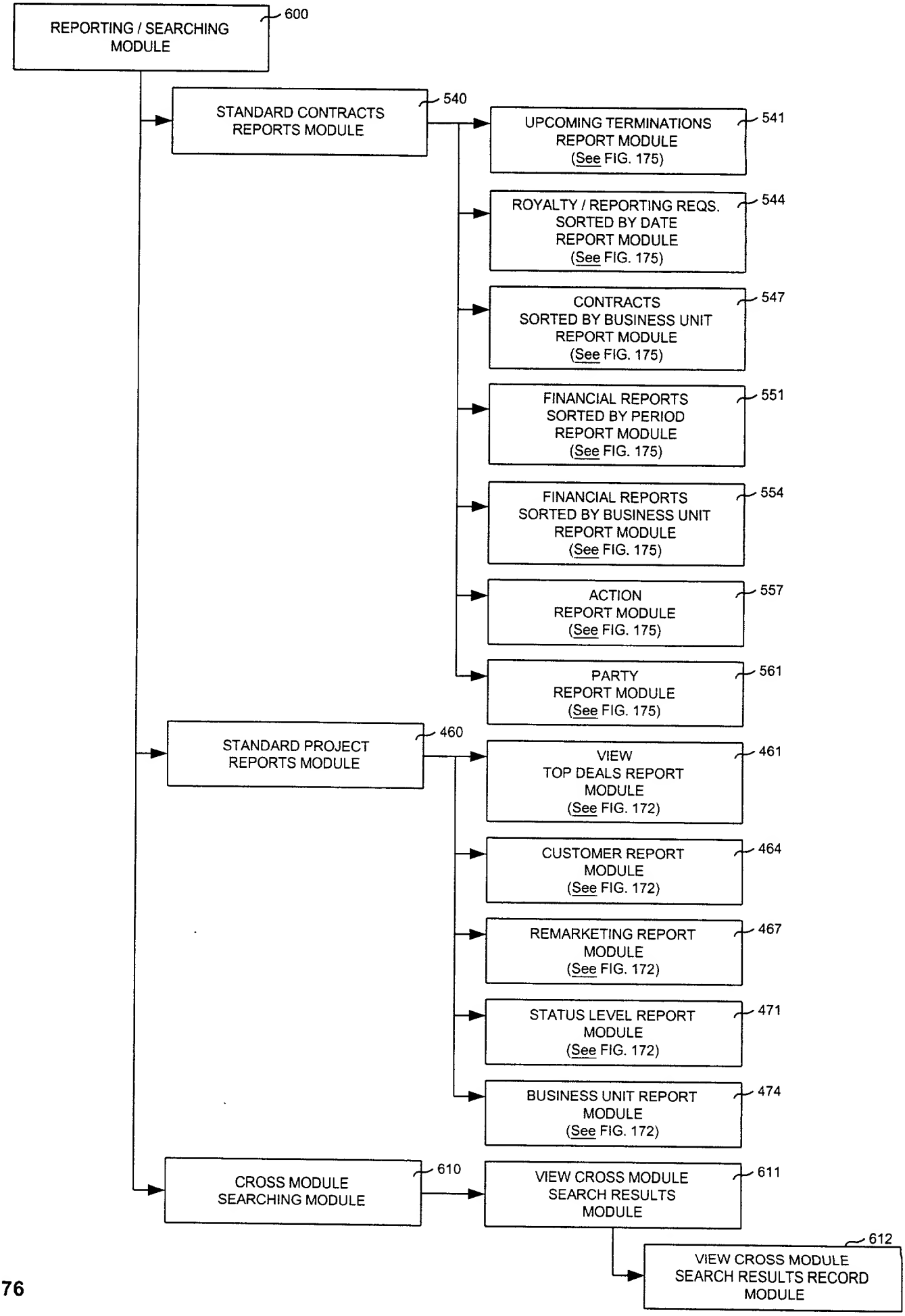

REPORTING / SEARCHING MODULE
600
STANDARD CONTRACTS REPORTS MODULE
540
UPCOMING TERMINATIONS REPORT MODULE (See FIG. 175)
541
ROYALTY / REPORTING REQS. SORTED BY DATE REPORT MODULE (See FIG. 175)
544
CONTRACTS SORTED BY BUSINESS UNIT REPORT MODULE (See FIG. 175)
547
FINANCIAL REPORTS SORTED BY PERIOD REPORT MODULE (See FIG. 175)
551
FINANCIAL REPORTS SORTED BY BUSINESS UNIT REPORT MODULE (See FIG. 175)
554
ACTION REPORT MODULE (See FIG. 175)
557
PARTY REPORT MODULE (See FIG. 175)
561
STANDARD PROJECT REPORTS MODULE
460
VIEW TOP DEALS REPORT MODULE (See FIG. 172)
461
CUSTOMER REPORT MODULE (See FIG. 172)
464
REMARKETING REPORT MODULE (See FIG. 172)
467
STATUS LEVEL REPORT MODULE (See FIG. 172)
471
BUSINESS UNIT REPORT MODULE (See FIG. 172)
474
CROSS MODULE SEARCHING MODULE
610
VIEW CROSS MODULE SEARCH RESULTS MODULE
611
VIEW CROSS MODULE SEARCH RESULTS RECORD MODULE
612

FIG. 176

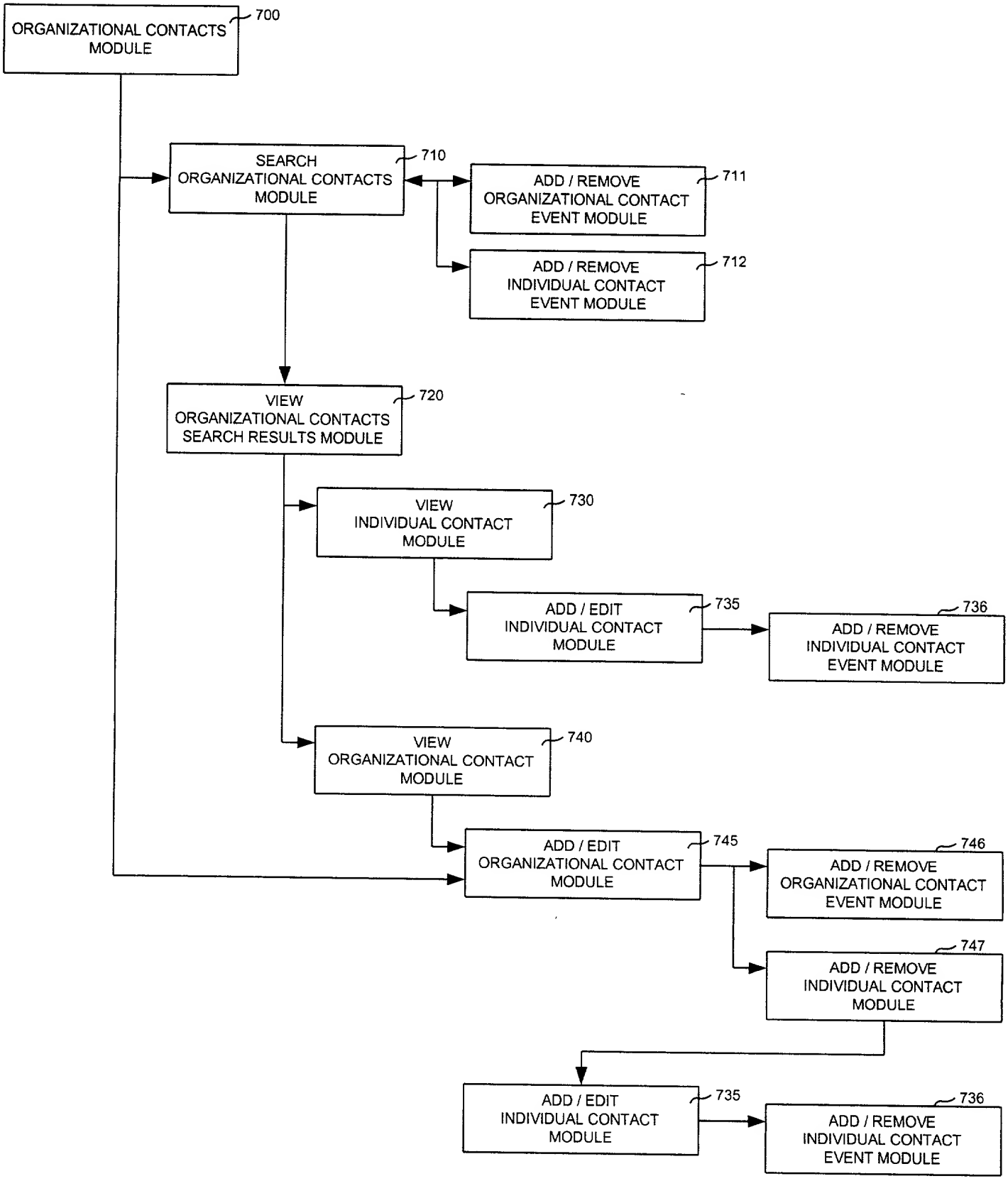

ORGANIZATIONAL CONTACTS MODULE
700
SEARCH ORGANIZATIONAL CONTACTS MODULE
710
ADD / REMOVE ORGANIZATIONAL CONTACT EVENT MODULE
711
ADD / REMOVE INDIVIDUAL CONTACT EVENT MODULE
712
VIEW ORGANIZATIONAL CONTACTS SEARCH RESULTS MODULE
720
VIEW INDIVIDUAL CONTACT MODULE
730
ADD / EDIT INDIVIDUAL CONTACT MODULE
735
ADD / REMOVE INDIVIDUAL CONTACT EVENT MODULE
736
VIEW ORGANIZATIONAL CONTACT MODULE
740
ADD / EDIT ORGANIZATIONAL CONTACT MODULE
745
ADD / REMOVE ORGANIZATIONAL CONTACT EVENT MODULE
746
ADD / REMOVE INDIVIDUAL CONTACT MODULE
747
ADD / EDIT INDIVIDUAL CONTACT MODULE
735
ADD / REMOVE INDIVIDUAL CONTACT EVENT MODULE
736

FIG. 177

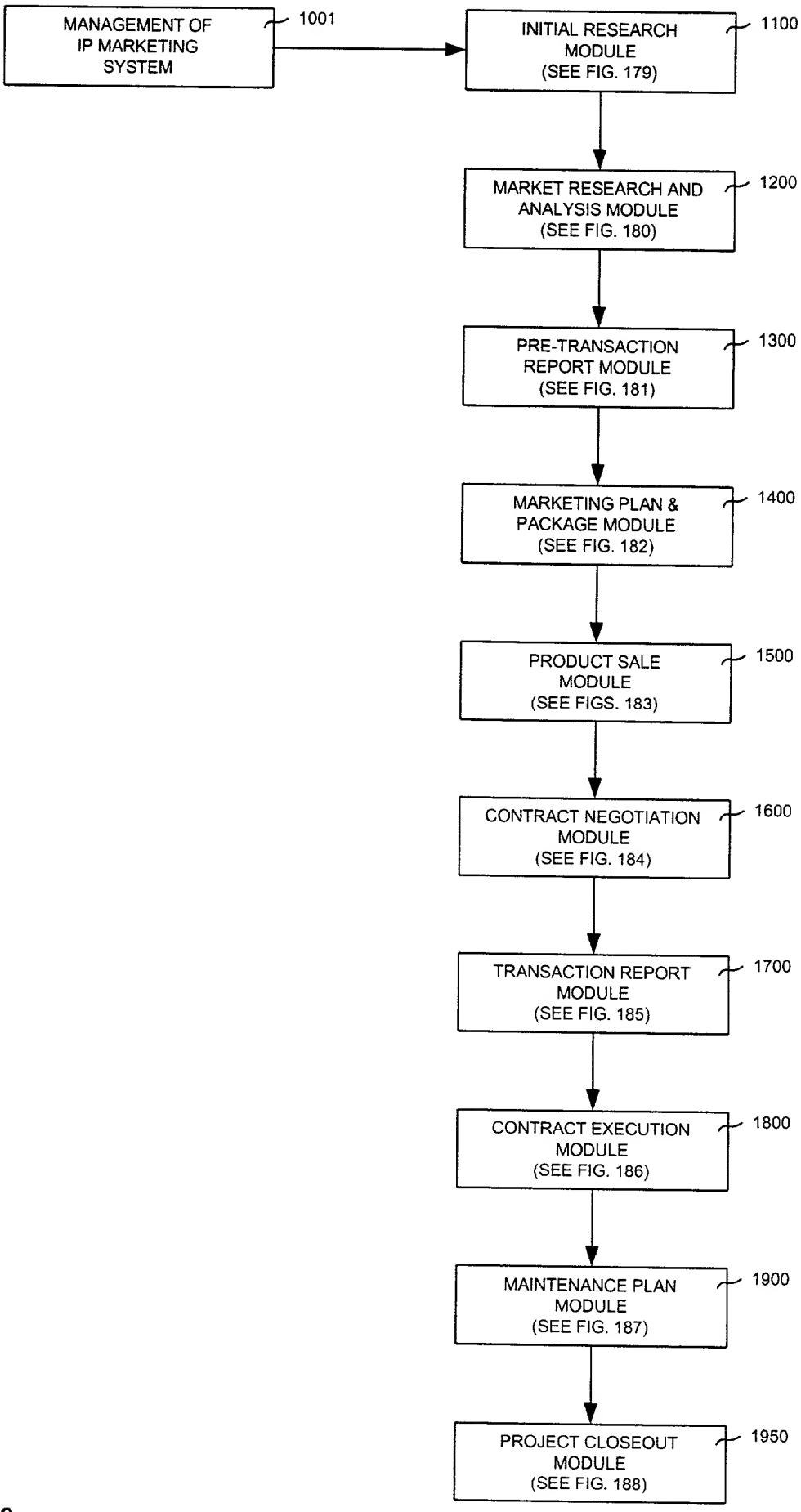

MANAGEMENT OF IP MARKETING SYSTEM
1001
INITIAL RESEARCH MODULE (SEE FIG. 179)
1100
MARKET RESEARCH AND ANALYSIS MODULE (SEE FIG. 180)
1200
PRE-TRANSACTION REPORT MODULE (SEE FIG. 181)
1300
MARKETING PLAN & PACKAGE MODULE (SEE FIG. 182)
1400
PRODUCT SALE MODULE (SEE FIGS. 183)
1500
CONTRACT NEGOTIATION MODULE (SEE FIG. 184)
1600
TRANSACTION REPORT MODULE (SEE FIG. 185)
1700
CONTRACT EXECUTION MODULE (SEE FIG. 186)
1800
MAINTENANCE PLAN MODULE (SEE FIG. 187)
1900
PROJECT CLOSEOUT MODULE (SEE FIG. 188)
1950

FIG. 178

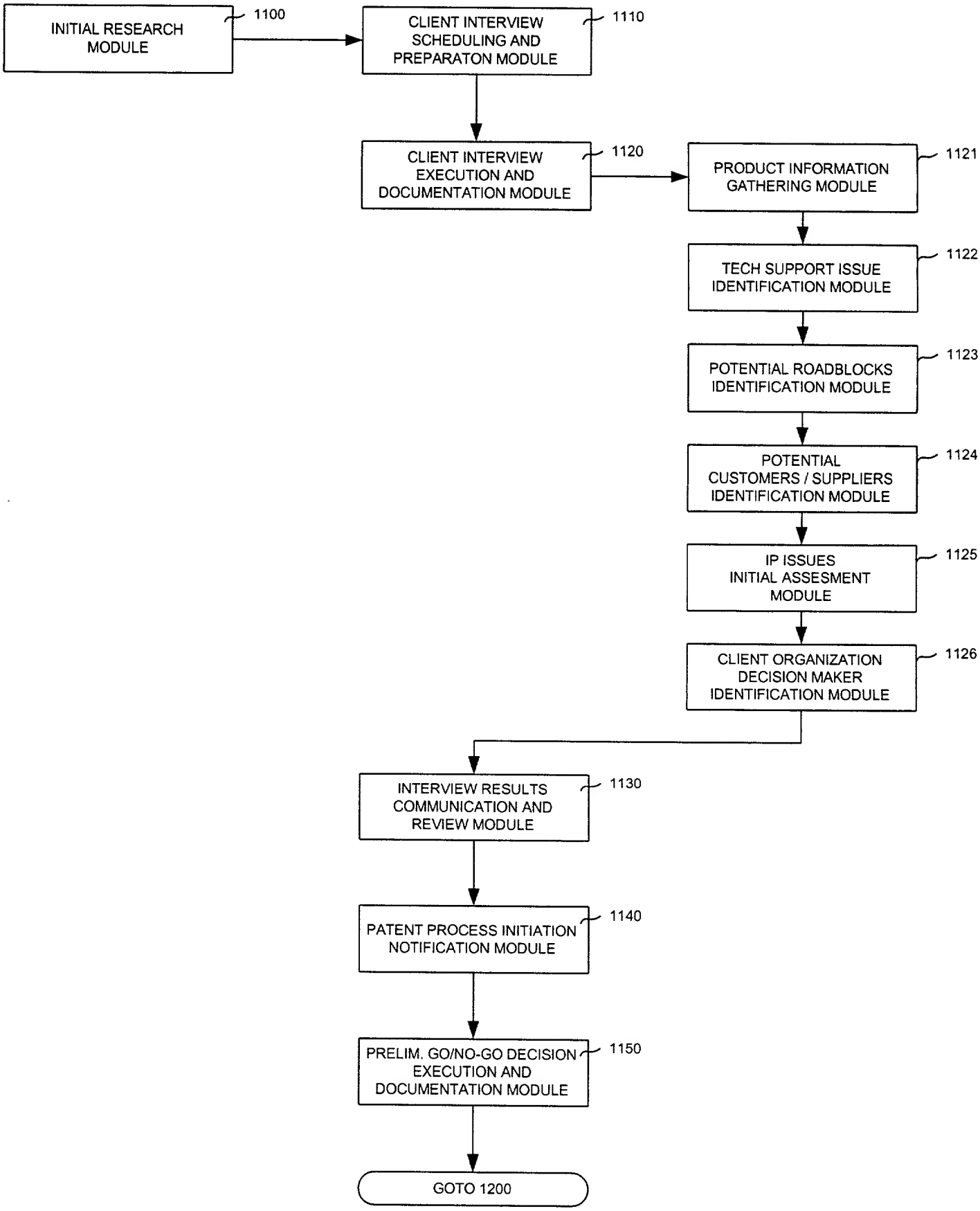

INITIAL RESEARCH MODULE
1100
CLIENT INTERVIEW SCHEDULING AND PREPARATON MODULE
1110
CLIENT INTERVIEW EXECUTION AND DOCUMENTATION MODULE
1120
PRODUCT INFORMATION GATHERING MODULE
1121
TECH SUPPORT ISSUE IDENTIFICATION MODULE
1122
POTENTIAL ROADBLOCKS IDENTIFICATION MODULE
1123
POTENTIAL CUSTOMERS / SUPPLIERS IDENTIFICATION MODULE
1124
IP ISSUES INITIAL ASSESMENT MODULE
1125
CLIENT ORGANIZATION DECISION MAKER IDENTIFICATION MODULE
1126
INTERVIEW RESULTS COMMUNICATION AND REVIEW MODULE
1130
PATENT PROCESS INITIATION NOTIFICATION MODULE
1140
PRELIM. GO/NO-GO DECISION EXECUTION AND DOCUMENTATION MODULE
1150
GOTO 1200

FIG. 179

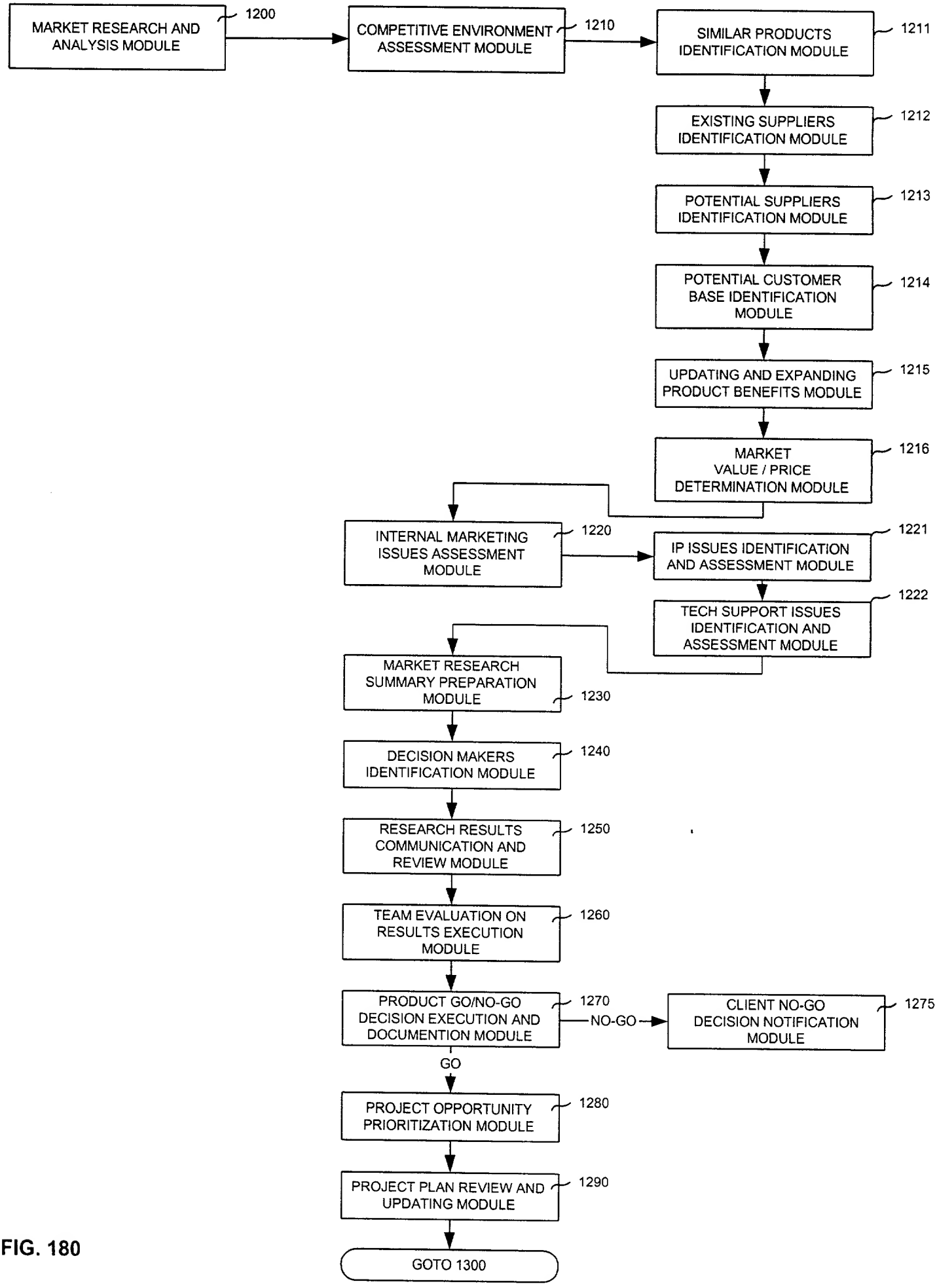

MARKET RESEARCH AND ANALYSIS MODULE
1200
COMPETITIVE ENVIRONMENT ASSESSMENT MODULE
1210
SIMILAR PRODUCTS IDENTIFICATION MODULE
1211
EXISTING SUPPLIERS IDENTIFICATION MODULE
1212
POTENTIAL SUPPLIERS IDENTIFICATION MODULE
1213
POTENTIAL CUSTOMER BASE IDENTIFICATION MODULE
1214
UPDATING AND EXPANDING PRODUCT BENEFITS MODULE
1215
MARKET VALUE / PRICE DETERMINATION MODULE
1216
INTERNAL MARKETING ISSUES ASSESSMENT MODULE
1220
IP ISSUES IDENTIFICATION AND ASSESSMENT MODULE
1221
TECH SUPPORT ISSUES IDENTIFICATION AND ASSESSMENT MODULE
1222
MARKET RESEARCH SUMMARY PREPARATION MODULE
1230
DECISION MAKERS IDENTIFICATION MODULE
1240
RESEARCH RESULTS COMMUNICATION AND REVIEW MODULE
1250
TEAM EVALUATION ON RESULTS EXECUTION MODULE
1260
PRODUCT GO/NO-GO DECISION EXECUTION AND DOCUMENTION MODULE
1270
NO-GO
CLIENT NO-GO DECISION NOTIFICATION MODULE
1275
GO
PROJECT OPPORTUNITY PRIORITIZATION MODULE
1280
PROJECT PLAN REVIEW AND UPDATING MODULE
1290
GOTO 1300

FIG. 180

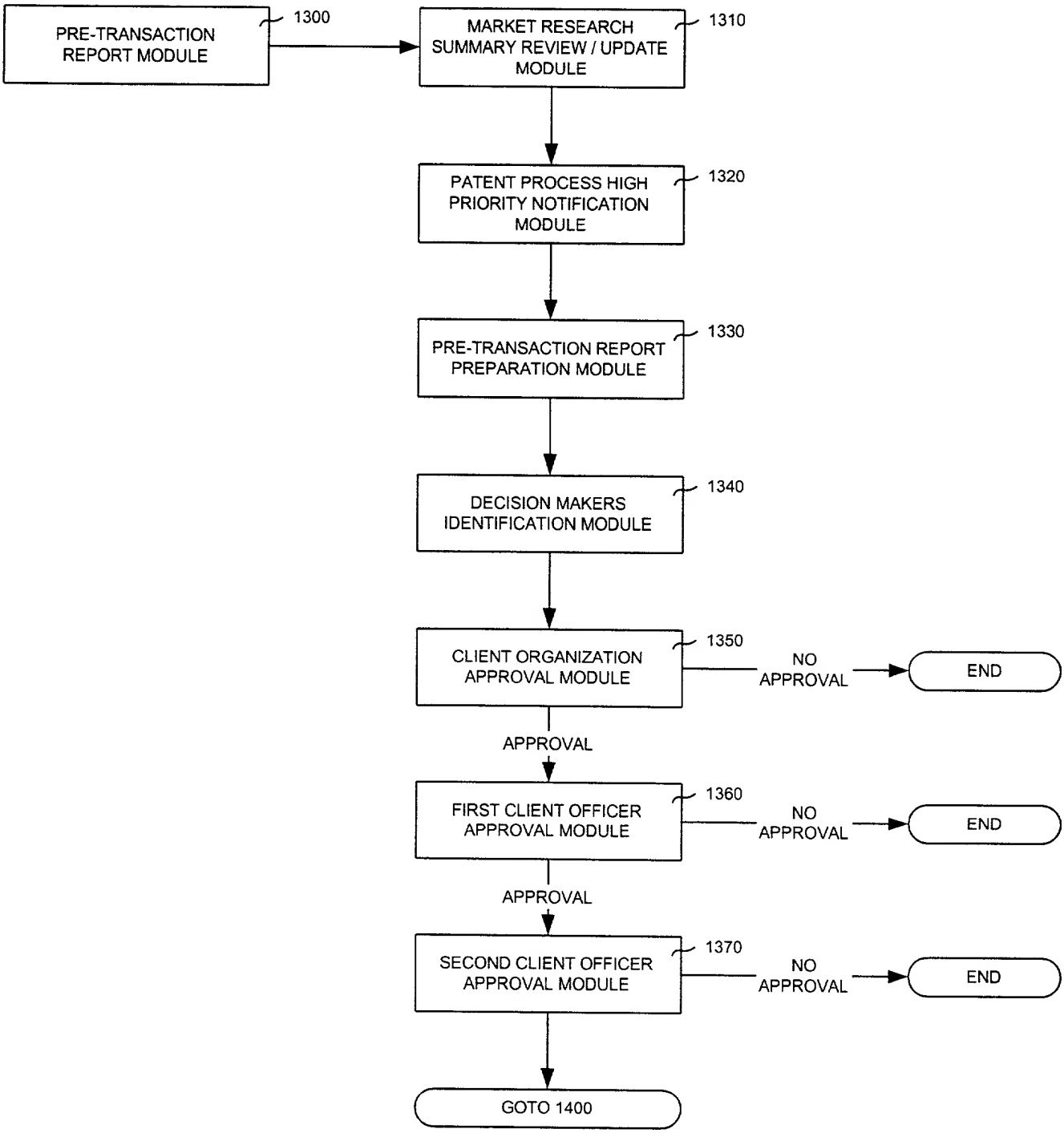

PRE-TRANSACTION REPORT MODULE
1300
MARKET RESEARCH SUMMARY REVIEW / UPDATE MODULE
1310
PATENT PROCESS HIGH PRIORITY NOTIFICATION MODULE
1320
PRE-TRANSACTION REPORT PREPARATION MODULE
1330
DECISION MAKERS IDENTIFICATION MODULE
1340
CLIENT ORGANIZATION APPROVAL MODULE
1350
NO APPROVAL
END
APPROVAL
FIRST CLIENT OFFICER APPROVAL MODULE
1360
NO APPROVAL
END
APPROVAL
SECOND CLIENT OFFICER APPROVAL MODULE
1370
NO APPROVAL
END
GOTO 1400

FIG. 181

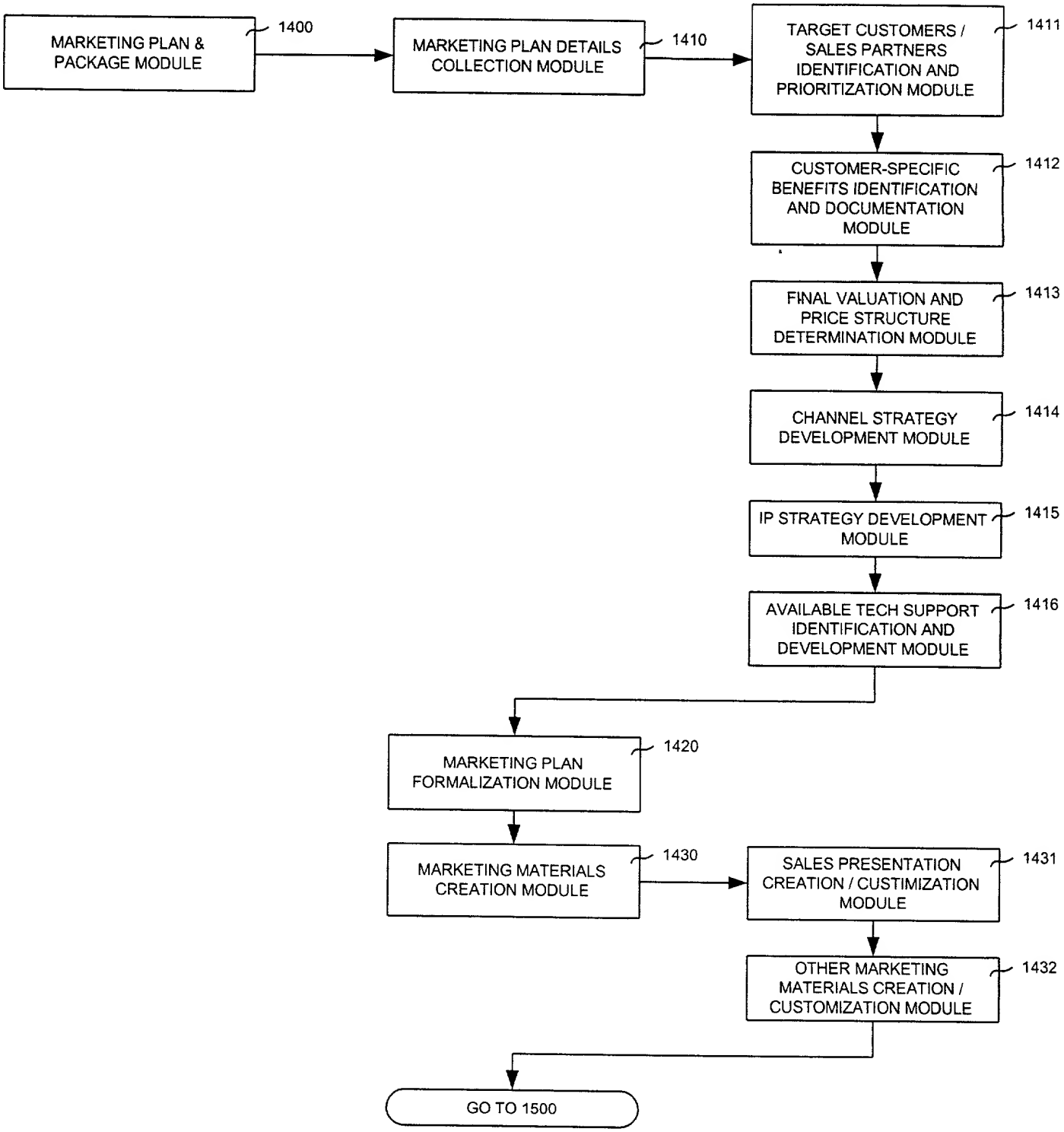

MARKETING PLAN & PACKAGE MODULE
1400
MARKETING PLAN DETAILS COLLECTION MODULE
1410
TARGET CUSTOMERS / SALES PARTNERS IDENTIFICATION AND PRIORITIZATION MODULE
1411
CUSTOMER-SPECIFIC BENEFITS IDENTIFICATION AND DOCUMENTATION MODULE
1412
FINAL VALUATION AND PRICE STRUCTURE DETERMINATION MODULE
1413
CHANNEL STRATEGY DEVELOPMENT MODULE
1414
IP STRATEGY DEVELOPMENT MODULE
1415
AVAILABLE TECH SUPPORT IDENTIFICATION AND DEVELOPMENT MODULE
1416
MARKETING PLAN FORMALIZATION MODULE
1420
MARKETING MATERIALS CREATION MODULE
1430
SALES PRESENTATION CREATION / CUSTIMIZATION MODULE
1431
OTHER MARKETING MATERIALS CREATION / CUSTOMIZATION MODULE
1432
GO TO 1500

FIG. 182

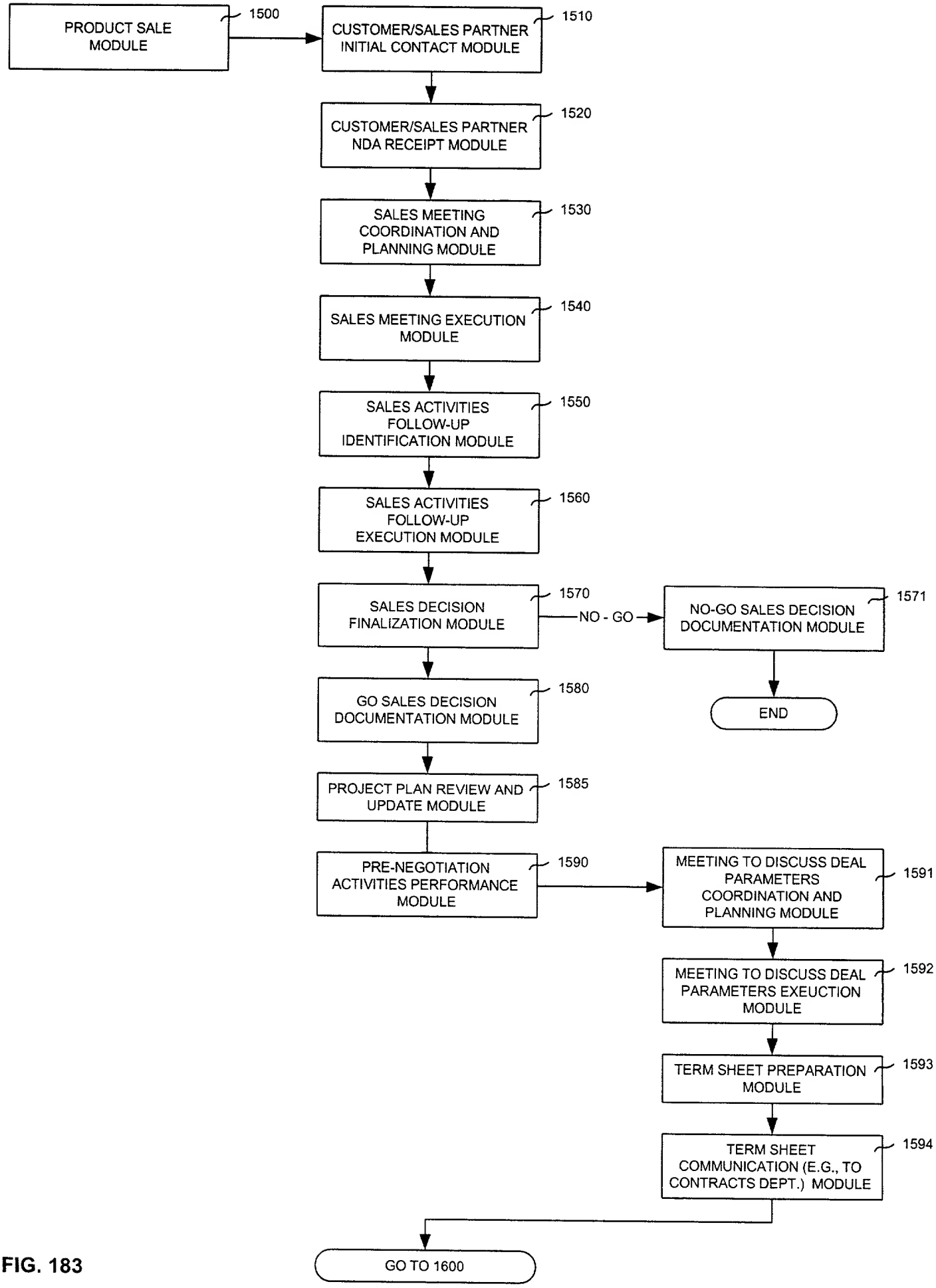

PRODUCT SALE MODULE
1500
CUSTOMER/SALES PARTNER INITIAL CONTACT MODULE
1510
CUSTOMER/SALES PARTNER NDA RECEIPT MODULE
1520
SALES MEETING COORDINATION AND PLANNING MODULE
1530
SALES MEETING EXECUTION MODULE
1540
SALES ACTIVITIES FOLLOW-UP IDENTIFICATION MODULE
1550
SALES ACTIVITIES FOLLOW-UP EXECUTION MODULE
1560
SALES DECISION FINALIZATION MODULE
1570
NO - GO
NO-GO SALES DECISION DOCUMENTATION MODULE
1571
END
GO SALES DECISION DOCUMENTATION MODULE
1580
PROJECT PLAN REVIEW AND UPDATE MODULE
1585
PRE-NEGOTIATION ACTIVITIES PERFORMANCE MODULE
1590
MEETING TO DISCUSS DEAL PARAMETERS COORDINATION AND PLANNING MODULE
1591
MEETING TO DISCUSS DEAL PARAMETERS EXEUCTION MODULE
1592
TERM SHEET PREPARATION MODULE
1593
TERM SHEET COMMUNICATION (E.G., TO CONTRACTS DEPT.) MODULE
1594
GO TO 1600

FIG. 183

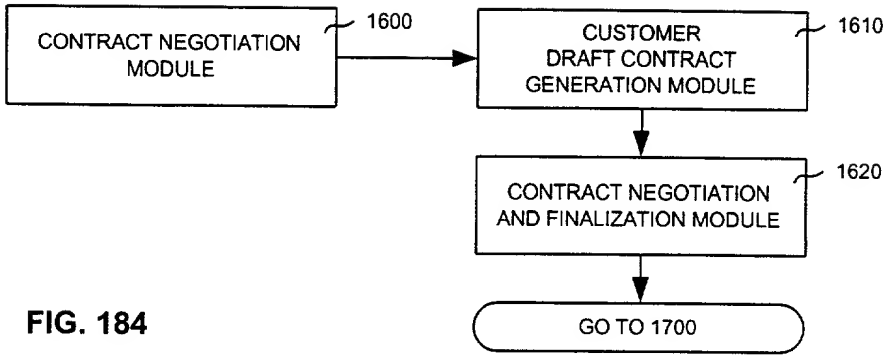


FIG. 184

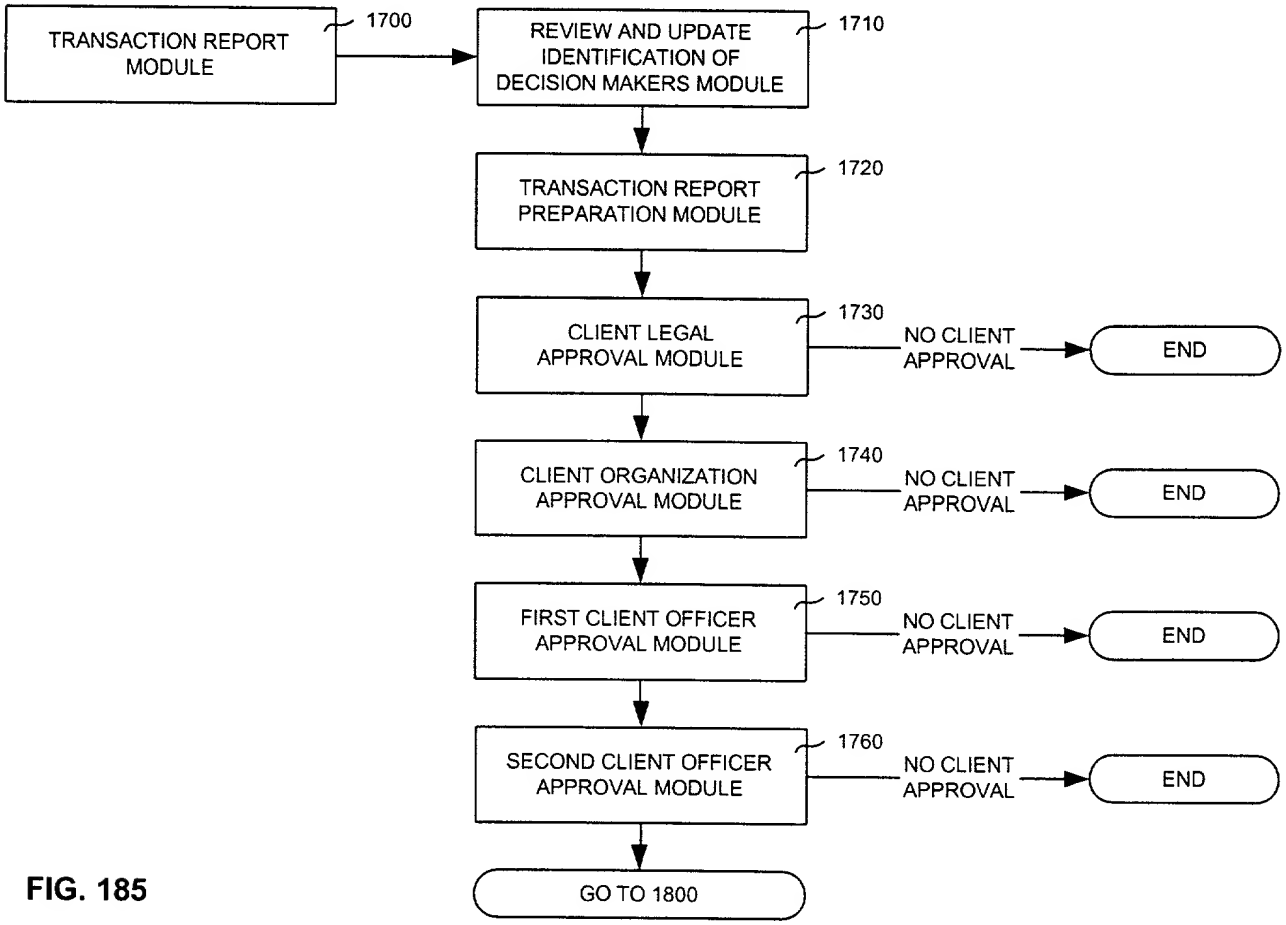


FIG. 185

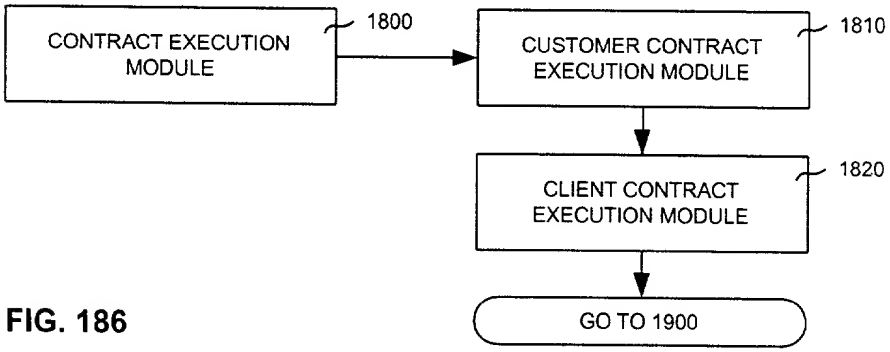


FIG. 186

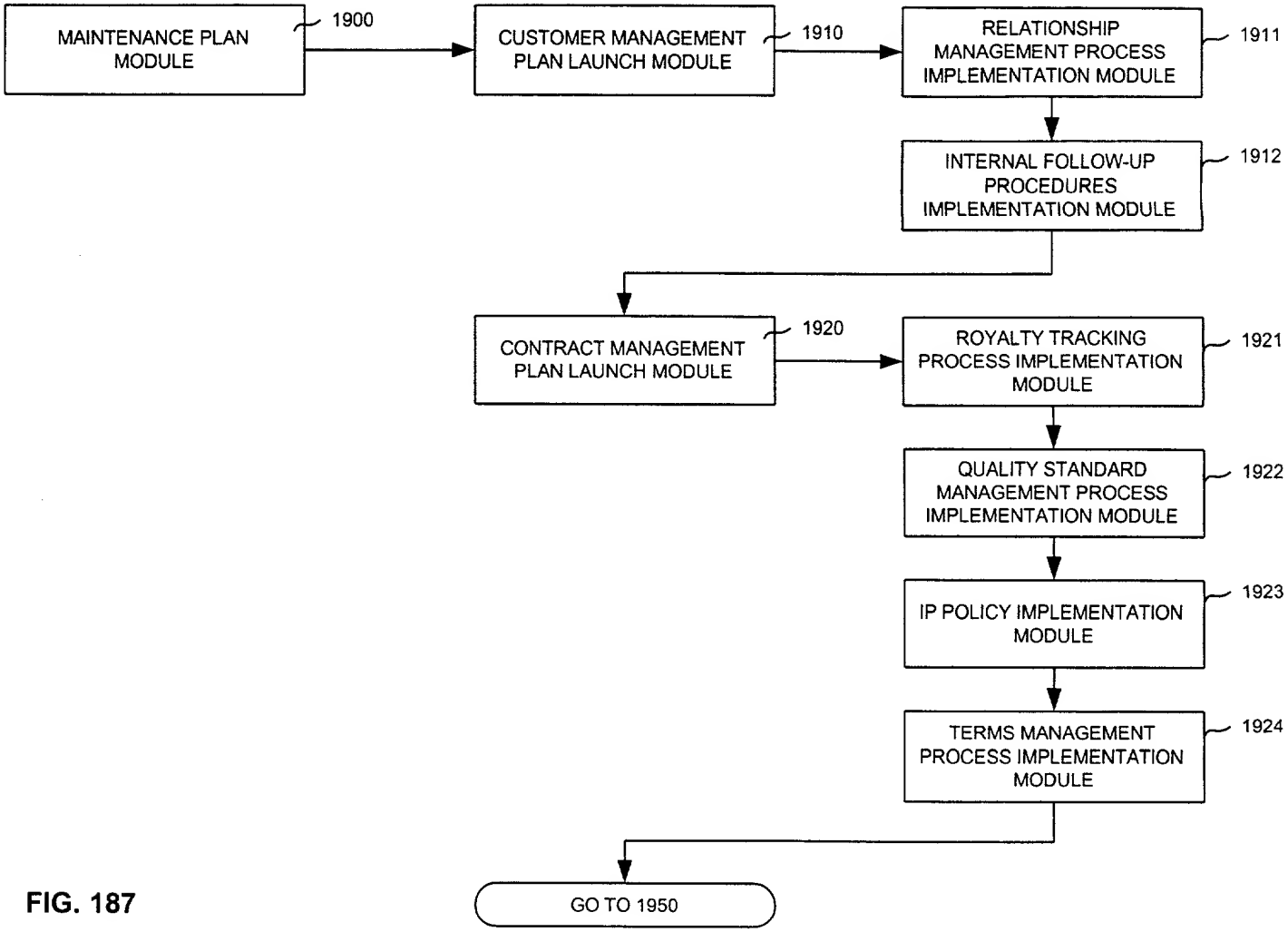


FIG. 187

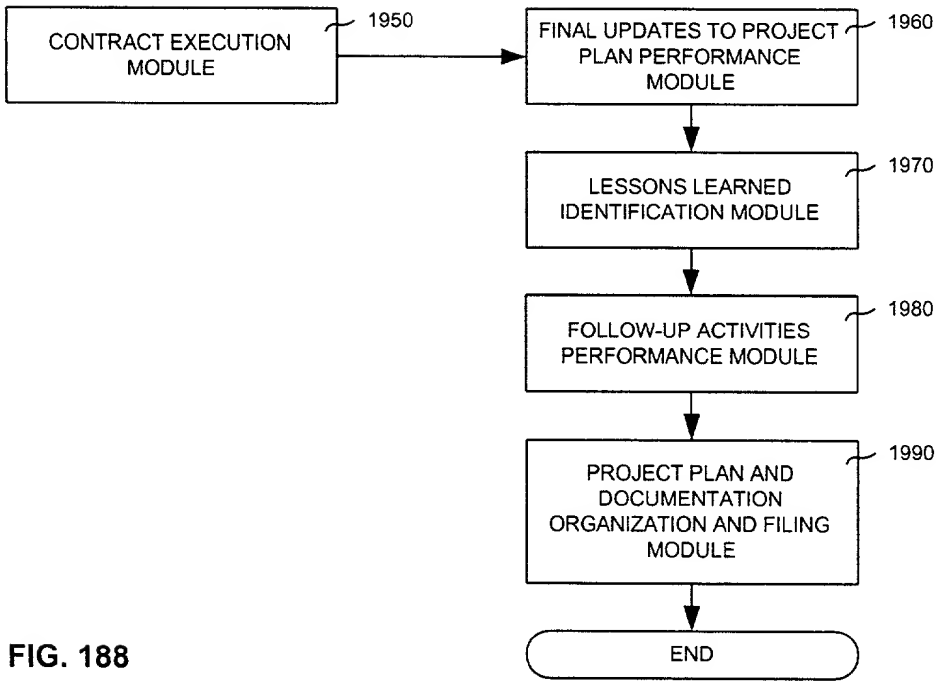


FIG. 188

Project Template Project Plan

ID		WBS	Task Name	Duration	Start	Finish	Pred	Succ	% Comp	Del	Resources
1		1	Conduct initial research	5 days	Mon 1/3/00	Fri 1/7/00			0%	No	Product Mgr
13		2	Conduct market research and analysis	10 days	Mon 1/10/00	Fri 1/21/00			0%	No	Mktg Analyst
31		3	Complete and approve pre-transaction report (PTR)	15 days	Mon 1/24/00	Fri 2/11/00			0%	No	Product Mgr
39		4	Develop marketing plan & package	15 days	Mon 1/24/00	Fri 2/11/00			0%	No	Mktg/Sales Rep
51		5	Sell product	50 days	Mon 2/14/00	Fri 4/21/00			0%	No	Mktg/Sales Rep
66		6	Negotiate contract	50 days	Mon 4/24/00	Fri 6/30/00			0%	No	Contract Mgr
69		7	Complete & approve transaction report (TR)	15 days	Mon 7/3/00	Fri 7/21/00			0%	No	Contract Mgr
76		8	Execute contract	10 days	Mon 7/24/00	Fri 8/4/00			0%	No	Contract Mgr
79		9	Set up maintenance plan	5 days	Mon 8/7/00	Fri 8/11/00		89	0%	No	Mktg/Sales Rep
88		10	Close out project	5 days	Mon 8/14/00	Fri 8/18/00			0%	Yes	Project Lead

FIG. 189

51 **Sell product**
At this point, duplicate project plan for each target customer for the specified product.

88 **Close out project**
Project may potentially end any one of several points within project plan. Must complete close out tasks at where ever project end falls within project plan.

FIG. 190

Project Template Project Plan

ID	O	WBS	Task Name	Duration	Start	Finish	Pred	Succ	% Comp	Deliv	Resources
1		1	**Conduct initial research**	**5 days**	**Mon 1/3/00**	**Fri 1/7/00**			**0%**	**No**	**Product Mgr**
2		1.1	Schedule & prepare for client interview	1 day	Mon 1/3/00	Mon 1/3/00		3	0%	No	Product Mgr
3		1.2	**Conduct & document client interview**	**1 day**	**Tue 1/4/00**	**Tue 1/4/00**	**2**	**10,11**	**0%**	**No**	**Product Mgr**
4		1.2.1	Gather product information	1 day	Tue 1/4/00	Tue 1/4/00			0%	No	Product Mgr
5		1.2.2	ID tech support issues	1 day	Tue 1/4/00	Tue 1/4/00			0%	No	Product Mgr
6		1.2.3	ID potential roadblocks	1 day	Tue 1/4/00	Tue 1/4/00			0%	No	Product Mgr
7		1.2.4	ID potential customers/suppliers	1 day	Tue 1/4/00	Tue 1/4/00			0%	No	Product Mgr
8		1.2.5	Perform initial assessment of IP issues	1 day	Tue 1/4/00	Tue 1/4/00			0%	No	Product Mgr
9		1.2.6	ID client organization decision makers	1 day	Tue 1/4/00	Tue 1/4/00			0%	No	Product Mgr
10		1.3	Communicate and review interview results	2 days	Wed 1/5/00	Thu 1/6/00	3	12	0%	No	Product Mgr
11		1.4	Notify *IPMAN* to begin patent process	1 day	Wed 1/5/00	Wed 1/5/00	3		0%	Yes	Product Mgr
12		1.5	Make & document prelim go/no-go decision	1 day	Fri 1/7/00	Fri 1/7/00	10	25,14,21	0%	Yes	Product Mgr
13		2	**Conduct market research and analysis**	**10 days**	**Mon 1/10/00**	**Fri 1/21/00**			**0%**	**No**	**Mktg Analyst**
14		2.1	**Assess competitive environment**	**4 days**	**Mon 1/10/00**	**Thu 1/13/00**	**12**	**24**	**0%**	**No**	**Mktg Analyst**
15		2.1.1	ID similar products	4 days	Mon 1/10/00	Thu 1/13/00			0%	No	Mktg Analyst
16		2.1.2	ID existing suppliers	4 days	Mon 1/10/00	Thu 1/13/00			0%	No	Mktg Analyst
17		2.1.3	ID potential suppliers	4 days	Mon 1/10/00	Thu 1/13/00			0%	No	Mktg Analyst
18		2.1.4	ID potential customer base	4 days	Mon 1/10/00	Thu 1/13/00		41	0%	No	Mktg Analyst
19		2.1.5	Update & expand product benefits	4 days	Mon 1/10/00	Thu 1/13/00			0%	No	Mktg Analyst
20		2.1.6	Determine market value/price	4 days	Mon 1/10/00	Thu 1/13/00			0%	No	Mktg Analyst
21		2.2	**Assess internal marketing issues**	**4 days**	**Mon 1/10/00**	**Thu 1/13/00**	**12**	**24**	**0%**	**No**	**Product Mgr**
22		2.2.1	ID & assess IP issues	4 days	Mon 1/10/00	Thu 1/13/00			0%	No	Product Mgr
23		2.2.2	ID & assess tech support issues	4 days	Mon 1/10/00	Thu 1/13/00			0%	No	Product Mgr

FIG. 191

Project Template Project Plan

ID	WBS	Task Name	Duration	Start	Finish	Pred	Succ	% Comp	Del	Resources
24	2.3	Prepare market research summary	1 day	Fri 1/14/00	Fri 1/14/00	14,21	26	0%	Yes	Mktg Analyst
25	2.4	ID decision makers	1 day	Mon 1/10/00	Mon 1/10/00	12	26	0%	Yes	Product Mgr
26	2.5	Communicate and review research results	2 days	Mon 1/17/00	Tue 1/18/00	24,25	27	0%	No	Mktg Analyst
27	2.6	Conduct team evaluation on results	1 day	Wed 1/19/00	Wed 1/19/00	26	28	0%	No	Product Mgr
28	2.7	Make & document product go/no go decision	1 day	Thu 1/20/00	Thu 1/20/00	27	29,30	0%	Yes	Product Mgr
29	2.8	Prioritize project opportunity or notify client of no go decision	1 day	Fri 1/21/00	Fri 1/21/00	28	41,34,35,32,33,4	0%	Yes	Product Mgr
30	2.9	Review & update project plan	1 day	Fri 1/21/00	Fri 1/21/00	28		0%	Yes	Product Mgr
31	3	**Complete and approve pre-transaction report (PTR)**	**15 days**	**Mon 1/24/00**	**Fri 2/11/00**			**0%**	**No**	**Product Mgr**
32	3.1	Review/update market research summary	1 day	Mon 1/24/00	Mon 1/24/00	29		0%	Yes	Mktg Analyst
33	3.2	Notify IAMAN of potential sale/move patent process into high priority	1 day	Mon 1/24/00	Mon 1/24/00	29		0%	No	Product Mgr
34	3.3	Prepare PTR	5 days	Mon 1/24/00	Fri 1/28/00	29	36	0%	Yes	Product Mgr
35	3.4	ID decision makers	1 day	Mon 1/24/00	Mon 1/24/00	29		0%	Yes	Product Mgr
36	3.5	Gain client organization approval	4 days	Mon 1/31/00	Thu 2/3/00	34	37	0%	Yes	Product Mgr
37	3.6	Gain VP Corporate Development approval	3 days	Fri 2/4/00	Tue 2/8/00	36	38	0%	Yes	Product Mgr
38	3.7	Gain VP CIO approval	3 days	Wed 2/9/00	Fri 2/11/00	37	52	0%	Yes	Product Mgr
39	4	**Develop marketing plan & package**	**15 days**	**Mon 1/24/00**	**Fri 2/11/00**			**0%**	**No**	**Mktg/Sales Rep**
40	4.1	**Gather marketing plan details**	**5 days**	**Mon 1/24/00**	**Fri 1/28/00**	**29**	**47**	**0%**	**No**	**Mktg/Sales Rep**
41	4.1.1	ID & prioritize target customer(s)/sales partners	5 days	Mon 1/24/00	Fri 1/28/00	18,29		0%	Yes	Mktg/Sales Rep
42	4.1.2	ID & document customer-specific benefits	5 days	Mon 1/24/00	Fri 1/28/00			0%	Yes	Mktg/Sales Rep
43	4.1.3	Determine final valuation & price structure	5 days	Mon 1/24/00	Fri 1/28/00			0%	Yes	Mktg Analyst
44	4.1.4	Develop channel strategy	5 days	Mon 1/24/00	Fri 1/28/00			0%	Yes	Mktg/Sales Rep
45	4.1.5	Develop IP strategy	5 days	Mon 1/24/00	Fri 1/28/00			0%	No	Mktg/Sales Rep
46	4.1.6	ID & develop available tech support	5 days	Mon 1/24/00	Fri 1/28/00			0%	No	Mktg/Sales Rep

FIG. 192

Project Template Project Plan

ID		WBS	Task Name	Duration	Start	Finish	Pred	Succ	% Comp	Del	Resources
47		4.2	Formalize marketing plan	5 days	Mon 1/31/00	Fri 2/4/00	40	50,49	0%	Yes	Mktg/Sales Rep
48		4.3	**Create marketing materials**	**5 days**	**Mon 2/7/00**	**Fri 2/11/00**			**0%**	**No**	**Product Mgr**
49		4.3.1	Create/customize sales presentation	5 days	Mon 2/7/00	Fri 2/11/00	47		0%	Yes	Product Mgr
50		4.3.2	Create/customize other marketing materials	5 days	Mon 2/7/00	Fri 2/11/00	47		0%	Yes	Product Mgr
51		5	**Sell product**	**50 days**	**Mon 2/14/00**	**Fri 4/21/00**			**0%**	**No**	**Mktg/Sales Rep**
52		5.1	Make initial contact with customer(s)/sales partners	3 days	Mon 2/14/00	Wed 2/16/00	38	53	0%	Yes	Mktg/Sales Rep
53		5.2	Obtain NDA from customer/sales partner	5 days	Thu 2/17/00	Wed 2/23/00	52	54	0%	Yes	Mktg/Sales Rep
54		5.3	Coordinate & plan sales meeting	10 days	Thu 2/24/00	Wed 3/8/00	53	55	0%	Yes	Mktg/Sales Rep
55		5.4	Conduct sales meeting	1 day	Thu 3/9/00	Thu 3/9/00	54	56	0%	No	Mktg/Sales Rep
56		5.5	ID follow-up sales activities	1 day	Fri 3/10/00	Fri 3/10/00	55	57	0%	Yes	Mktg/Sales Rep
57		5.6	Perform follow-up sales activities	5 days	Mon 3/13/00	Fri 3/17/00	56	58	0%	No	Mktg/Sales Rep
58		5.7	Finalize sales decision	10 days	Mon 3/20/00	Fri 3/31/00	57	59,60,62	0%	Yes	Mktg/Sales Rep
59		5.8	Document go/no go sale decision	1 day	Mon 4/3/00	Mon 4/3/00	58		0%	Yes	Mktg/Sales Rep
60		5.9	Review & update project plan	1 day	Mon 4/3/00	Mon 4/3/00	58		0%	Yes	Mktg/Sales Rep
61		5.10	**Perform pre-negotiation activities**	**15 days**	**Mon 4/3/00**	**Fri 4/21/00**			**0%**	**No**	**Mktg/Sales Rep**
62		5.10.1	Coordinate & plan meeting to discuss deal parameters	10 days	Mon 4/3/00	Fri 4/14/00	58	63	0%	Yes	Mktg/Sales Rep
63		5.10.2	Conduct meeting to discuss deal parameters	1 day	Mon 4/17/00	Mon 4/17/00	62	64	0%	No	Mktg/Sales Rep
64		5.10.3	Prepare term sheet	3 days	Tue 4/18/00	Thu 4/20/00	63	65	0%	Yes	Mktg/Sales Rep
65		5.10.4	Communicate term sheet to Contracts	1 day	Fri 4/21/00	Fri 4/21/00	64	67	0%	No	Mktg/Sales Rep
66		6	**Negotiate contract**	**50 days**	**Mon 4/24/00**	**Fri 6/30/00**			**0%**	**No**	**Contract Mgr**
67		6.1	Generate draft contract for customer	5 days	Mon 4/24/00	Fri 4/28/00	65	68	0%	Yes	Contract Mgr
68		6.2	Negotiate and finalize contract	45 days	Mon 5/1/00	Fri 6/30/00	67	70,71	0%	Yes	Contract Mgr
69		7	**Complete & approve transaction report (TR)**	**15 days**	**Mon 7/3/00**	**Fri 7/21/00**			**0%**	**No**	**Contract Mgr**

FIG. 193

Project Template Project Plan

ID	WBS	Task Name	Duration	Start	Finish	Pred	Succ	% Comp	Del	Resources
70	7.1	Review/update decision makers	1 day	Mon 7/3/00	Mon 7/3/00	68		0%	Yes	Mktg/Sales Rep
71	7.2	Prepare TR	5 days	Mon 7/3/00	Fri 7/7/00	68	72	0%	Yes	Mktg/Sales Rep
72	7.3	Obtain IPMARK legal approval	1 day	Mon 7/10/00	Mon 7/10/00	71	73	0%	Yes	Contract Mgr
73	7.4	Obtain client organization approval	3 days	Tue 7/11/00	Thu 7/13/00	72	74	0%	Yes	Contract Mgr
74	7.5	Obtain VP Corporate Development approval	3 days	Fri 7/14/00	Tue 7/18/00	73	75	0%	Yes	Contract Mgr
75	7.6	Obtain VP CIO approval	3 days	Wed 7/19/00	Fri 7/21/00	74	77	0%	Yes	Contract Mgr
76	8	**Execute contract**	**10 days**	**Mon 7/24/00**	**Fri 8/4/00**			**0%**	**No**	**Contract Mgr**
77	8.1	Obtain customer contract signature	8 days	Mon 7/24/00	Wed 8/2/00	75	78	0%	Yes	Contract Mgr
78	8.2	Obtain IPMARK contract signature	2 days	Thu 8/3/00	Fri 8/4/00	77	80,83	0%	Yes	Contract Mgr
79	9	**Set up maintenance plan**	**5 days**	**Mon 8/7/00**	**Fri 8/11/00**		89	**0%**	**No**	**Mktg/Sales Rep**
80	9.1	**Launch customer management plan**	**5 days**	**Mon 8/7/00**	**Fri 8/11/00**	78		**0%**	**No**	**Mktg/Sales Rep**
81	9.1.1	Implement relationship management process	5 days	Mon 8/7/00	Fri 8/11/00			0%	No	Mktg/Sales Rep
82	9.1.2	Implement internal follow-up procedures	5 days	Mon 8/7/00	Fri 8/11/00			0%	No	Mktg/Sales Rep
83	9.2	**Launch contract management plan**	**5 days**	**Mon 8/7/00**	**Fri 8/11/00**	78		**0%**	**No**	**Contract Mgr**
84	9.2.1	Implement royalty tracking process	5 days	Mon 8/7/00	Fri 8/11/00			0%	No	Contract Mgr
85	9.2.2	Implement quality standard management process	5 days	Mon 8/7/00	Fri 8/11/00			0%	No	Contract Mgr
86	9.2.3	Implement IP policing	5 days	Mon 8/7/00	Fri 8/11/00			0%	No	Contract Mgr
87	9.2.4	Implement terms management process	5 days	Mon 8/7/00	Fri 8/11/00			0%	No	Contract Mgr
88	10	**Close out project**	**5 days**	**Mon 8/14/00**	**Fri 8/18/00**			**0%**	**Yes**	**Project Lead**
89	10.1	Perform final updates to project plan	1 day	Mon 8/14/00	Mon 8/14/00	79	90	0%	Yes	Project Lead
90	10.2	Identify lessons learned & perform follow-up activities	2 days	Tue 8/15/00	Wed 8/16/00	89	91	0%	Yes	Project Lead
91	10.3	Organize & file project plan & documentation	2 days	Thu 8/17/00	Fri 8/18/00	90		0%	Yes	Project Lead

FIG. 194

3 **Conduct & document client interview**
If create interview form, can eliminate tasks 1.2.1 thru 1.2.6

4 **Gather product information**
Must include product benefits, similar products, etc.

5 **ID tech support issues**
Type of support required? Tech transfer? Support partner? No support?

8 **Perform initial assessment of IP issues**
Title and rights:
1. Ownership?
2. Protection?
3. Possible infringement?

9 **ID client organization decision makers**
Consider decision makers and needed officer buy-in.

11 **Notify IPMAN to begin patent process**
Potential checklist/form for interview process. If form, change task to "Provide interview form (name or number) to IPMAN". This notification will trigger IPMAN to review patent status.

12 **Make & document prelim go/no-go decision**
Potential form to doc reasons for go/no go.

14 **Assess competitive environment**
Potential checklist or standard form for assessing comp. environment. If so, may choose to delete 2.1.1 thru 2.1.7 and change 2.1 task name to something like complete Form XXX, Competitive Environment Assessment.

22 **ID & assess IP issues**
Expanded investigation of any ownership, protection, potential infringement issues.

24 **Prepare market research summary**
Potential Score Card form. If so, indicate in task field.

25 **ID decision makers**
Verify that all key decision makers are identified

28 **Make & document product go/no go decision**
Potential form to doc reasons for go/no go.

29 **Prioritize project opportunity or notify client of no go decision**
Create scorecard to prioritize.
Create form letter that thanks client and notifies of status of product.

32 **Review/update market research summary**
Potential form, Part 2 of Score Card, more market plan specific info.

34 **Prepare PTR**
No formal client interview but Product Manager will communicate with client regularly while preparing the PTR

35 **ID decision makers**
May require multiple client approvals. If so, add task for additional approval(s) - i.e. business unit and IT approval.
If patent license, add task for OWNER approval.

42 **ID & document customer-specific benefits**
If form or checklist, can eliminate this task. May be considered part of marketing plan.

43 **Determine final valuation & price structure**
If form or checklist, can eliminate this task.

FIG. 195

51 **Sell product**
At this point, duplicate project plan for each target customer for the specified product.

52 **Make initial contact with customer(s)/sales partners**
Must have signed PTR before initial contact with potential customer

53 **Obtain NDA from customer/sales partner**
Inbound NDA for receiving information and mutual NDA also available on h: drive

55 **Conduct sales meeting**
Including PowerPoint sales presentation

56 **ID follow-up sales activities**
May include demos, site visits to existing customers, brochures, additional presentations, response to meeting questions...OR NOTHING!

58 **Finalize sales decision**
Resource for this task is actually the customer.

63 **Conduct meeting to discuss deal parameters**
Recommend use term sheet for outline of meeting agenda. See link to term sheet on task 5.10.3, Prepare term sheet.

68 **Negotiate and finalize contract**
Could be multiple drafts and result in additional meetings between IPMARK and customer, includes obtaining all necessary approvals

71 **Prepare TR**
If time & resources permit, Mktg/Sales rep should begin pulling together the TR in parallel with task 6.2, Negotiate & finalize contract.

85 **Implement quality standard management process**
Follow up with new customer/sales partner for samples of products to check for product quality.

88 **Close out project**
Project may potentially end any one of several points within project plan. Must complete close out tasks at where ever project end falls within project plan.

89 **Perform final updates to project plan**
Final updates include any clean-up to project plan, e.g. review/update task durations to accurately represent time spent on project tasks. Final update helpful in accurately tracking project and project plan efficiency to allow for process improvement.

90 **Identify lessons learned & perform follow-up activities**
Follow-up could include analyzing project effectiveness and updating generic plan

91 **Organize & file project plan & documentation**
Final project plan should be part of project documentation. Need to develop checklist for keep/not keep documentation. May want to choose std color file for this so always identifiable. Also consider one color for project in progress and another color for project complete.

FIG. 196

Client Interview questionnaire (task 1.2)
(Completion Date: _____)

1. Gather product information

2. ID tech support issues

3. ID potential roadblocks

4. ID potential customers/suppliers

5. Perform initial assessment of IP issues

6. ID client organization decision makers

FIG. 197

Assess competitive environment checklist (task 2.1)
(Duration: 4 days – Complete by: _____)

ID similar products ..... _____

ID existing suppliers ..... _____

ID potential suppliers ..... _____

ID potential customer base ..... _____

Update & expand product benefits ..... _____

Determine market value/price..... _____

FIG. 198

Assess internal marketing issues checklist (task 2.2)
(Addresses internal IP and Tech Support issues)

1. ID & assess IP issues

2. ID & assess tech support issues

FIG. 199

INTELLECTUAL PROPERTY OUTMARKETING
PRE-TRANSACTION REPORT

Product/Project Name: _____

Entity Requesting: _____

Contacts (Entity Name, Phone Numbers, Email): _____

Outmarketing Party(s) (Company, Address, State of Incorporation, Contacts, Phone Phone Numbers): _____

Intellectual Property Involved: (Patents, Trademarks, Trade Secrets, Software, etc.) _____

Background of Deal (How Deal Developed, Summary of Intellectual Property Functionality/Uses, Deal Structure): _____

Financial Analysis (Revenue to be Recognized, Cost Savings, etc.): _____

Competitive Analysis (Worldwide, Outside US, US only, Outside 9 State Region, etc.): _____

Status of Deal (Ready to Sign Up, Need Negotiation Assistance): _____

Anticipated Timeline (Initial Meeting, Demos, Sign Contract, etc.): _____

_____, a _____ Corporation subsidiary, requests IPMARK _____ on its behalf to enter into an intellectual property outmarketing agreement according to the above-described terms.

Requestor	Entity/Dept.	Title	Date
_____	_____	_____	_____

FIG. 200

Marketing Plan checklist (task 4.1)

ID & prioritize target customer(s)/sales partners ..... _____

ID & document customer-specific benefits ..... _____

Determine final valuation & price structure ..... _____

Develop channel strategy ..... _____

Develop IP strategy ..... _____

ID & develop available tech support ..... _____

Formalize marketing plan ..... _____

FIG. 201

NONDISCLOSURE AGREEMENT

THIS NONDISCLOSURE AGREEMENT is made by and between [Name of _____ Entity], a corporation organized under the laws of _____ ("OWNER"), and _____, a corporation organized under the laws of _____ (the "Company"), effective as of _____ ___, 20__. The parties agree as follows:

1. Project Defined. The Company may receive from OWNER information of a non-public nature for use by the Company and its officers, directors, agents, employees and representatives, including financial and legal advisers (collectively "Representatives"), in the course of the performance of the Company's services for OWNER in connection with _____ _____ _____ (the "Project").

2. Information Defined. The Company acknowledges that, in the course of its performance of services for or discussions with OWNER in connection with the Project, the Company will receive certain private and proprietary information from or about OWNER or its affiliates, including but not limited to technical, financial or business information and models, names of customers or partners; proposed business deals, reports, plans, market projections, software programs, data or any other private and proprietary information relating to the Project which may include certain trade secrets ("Information"). The term "Information" as used herein also includes: (i) the fact that the Information has been made available to or is being inspected or evaluated by the Company; (ii) the fact that the Company is providing services to OWNER or is otherwise involved in or discussing the Project; and (iii) any information, work papers, analyses, compilations, projections, studies, documents, terms, conditions, correspondence, facts or other materials derived or produced by the Company or its representatives for OWNER in connection with the Project. Any Information supplied by OWNER to the Company prior to the execution of this Agreement shall be subject to the same treatment as the Information made available after the execution of this Agreement.

3. Exclusions from Definition. The term "Information" as used herein does not include any data or information that: (a) is already known to the Company at the time it is disclosed to the Company; or (b) before being divulged by the Company: (i) has become generally known to the public through no wrongful act of the Company or its representatives; (ii) has been rightfully received by the Company from a third party without restriction on disclosure and without a breach of an obligation of confidentiality

FIG. 202

running directly or indirectly to OWNER; (iii) has been approved for release by a written authorization by OWNER; or (iv) is independently developed by the Company without use, directly or indirectly, of the Information received from OWNER.

4. Nondisclosure Obligation. The Company shall keep the Information confidential and shall not disclose such Information, in whole or in part, to any person other than its Representatives who need to know such Information in connection with the Company's performance of services for OWNER in connection with the Project except with the prior written consent of OWNER or as otherwise permitted hereunder. Such Representatives shall be informed by the Company of the confidential nature of the Information and shall be required by the Company to agree in writing to be bound by this Agreement. The Information shall be used by the Company solely for the purpose of performing services for or otherwise evaluating the information provided by OWNER in connection with the Project, and shall not be otherwise used for the Company's own benefit or for any purpose detrimental to the interests of

5. Standard of Protection. For the purpose of complying with the obligations set forth herein, the Company shall use efforts commensurate with those that it employs for the protection of corresponding sensitive information of its own, which shall in any event be no lesser a standard than the type of efforts that would be taken by a reasonable business for the protection of its own highly confidential information and trade secrets.

6. Compliance with Legal Process. In the event that the Company is legally requested or required (by oral questions, interrogatories, requests for information or documents, subpoena, Civil Investigative Demand or similar process or, in the opinion of counsel for the Company, by federal or state securities or other statutes, regulations or laws) to disclose any Information, the Company shall promptly notify OWNER of such request or requirement prior to disclosure so that OWNER may seek an appropriate protective order and/or waive compliance with the terms of this Agreement.

7. Ownership; Return of Information. All Information (including tangible copies and computerized or electronic versions and summaries thereof) shall remain the property of OWNER. Within ten (10) days following the receipt of a written request from OWNER, the Company shall deliver to OWNER all tangible materials containing or embodying the Information received from OWNER, together with a certificate executed by an officer of the Company certifying that all such materials in the Company's possession or control have been delivered to OWNER or destroyed. The Company shall not assert directly or indirectly any right with respect to the Information which may impair or be adverse to OWNER's ownership thereof.

FIG. 203

8. Remedies for Breach. The Company understands and agrees that money damages would not be a sufficient remedy for any breach of this Agreement and that OWNER shall be entitled to seek injunctive or other equitable relief to remedy or forestall any such breach or threatened breach. Such remedy shall not be deemed to be the exclusive remedy for any breach of this Agreement, but shall be in addition to all other rights and remedies available at law or in equity.

9. No Representations or Further Obligations. Neither this Agreement nor the disclosure of Information shall constitute or imply any promise or intention to make any purchase of services by OWNER. None of the Information which may be disclosed by OWNER shall constitute any representation, warranty, assurance, guarantee or inducement by OWNER to the Company of any kind, and in particular, with respect to the accuracy or completeness of any Information or the non-infringement of trademarks, patents, copyrights, mask protection rights or any other intellectual property rights, or other rights of third persons. It is understood that this Agreement does not obligate OWNER to enter into any further agreements or to proceed with any possible relationship or other transaction.

10. Term; Termination. This Agreement shall terminate as to the exchange of any new Information three (3) years after the effective date hereof. Either party may terminate the exchange of Information under this Agreement at any time by written notice to the other specifically referencing this Agreement. In any event, however, the obligations of the Company to maintain the confidentiality of the Information it has received under this Agreement shall continue for a period of three (3) years after such termination and then terminate; provided, however, that such obligation shall continue indefinitely as to Information constituting a trade secret under applicable law for so long as such Information remains a trade secret.

11. No Waiver. No failure or delay by OWNER in exercising any right, power or privilege hereunder shall operate as a waiver thereof, nor shall any single or partial exercise thereof preclude any other or further exercise thereof or the exercise of any other right, power or privilege hereunder.

12. Amendment. This Agreement may not be modified, supplemented or amended orally, but only by a writing signed by both parties hereto.

13. Applicability to Associated Parties. Any information disclosed to the Company by any of OWNER's affiliated companies or by any company, person or other entity participating with OWNER in any consortium, partnership, joint venture or

FIG. 204

similar business combination in connection with the Project, which would otherwise constitute Information hereunder if disclosed by OWNER, shall be deemed to constitute Information under this Agreement, and the rights of OWNER under this Agreement may be enforced by any such affiliate or other entity in addition to with respect to any violation relating to the Information disclosed by such affiliate or other entity, as if such entity were also a party to this Agreement.

14. Governing Law. This Agreement shall be governed by and construed and enforced in accordance with the laws of the State of _____, without regard to its choice of law provisions.

IN WITNESS WHEREOF, the parties have executed and delivered this Nondisclosure Agreement effective as of the date first written above.

OWNER:

By:_____

Name:_____

Title:_____

Company:

By:_____

Name:_____

Title:_____

Confidential Information

FIG. 205

Product Name

License Agreement Term Sheet

- Definitions
  What is licensed?

- Specs of the Software (exhibit)
  Definition/description?

- Delivery, testing and acceptance
  How should this work?

- Grant and Scope of License
  Exclusive? Non-exclusive? Etc.?

- Term and Limitations on Use and reproduction
  What can partnership do with it?

- Sublicensing and transfer limitations

- Pricing Terms
  Royalties? Buy? Savings?

- Acct and audit rights
  As stated in the partnership agmt?

- Sales and Property tax liability
  Who liable?

- Trade secret protection/Confidentiality terms
  Need to be strict. In what manner may disclosure be made to vendors, particularly STB mfts?

FIG. 206

- Title to original software and owner infringement reps
  Positive stmt of ownership –will we indemnify the partnership?

- Ownership of mods enhancement and additions
  Who owns?

- Source code inclusion/exclusion and protection
  Must source be disclosed to partnership?

- Training and documentation req's
  Any?

- Protection of Trademarks
  Partnership must honor owner's marks

- SW maintenance and technical support obligations

- Vendor warranty obligations and scope

- Limitation of liability and types of damages

- Vendor indemnity and obligations in event of infringement

- Dispute resolution provisions

- Insurance terms (vendor on site?)

- Assignment limitations

- Std boilerplate (merger, written agmt, force majeur, etc)

FIG. 207

INTELLECTUAL PROPERTY OUTMARKETING TRANSACTION REPORT

INTELLECTUAL PROPERTY INVOLVED:

OUTMARKETING PARTY:

BUSINESS DEAL CONTACTS:

INTELLECTUAL PROPERTY CONTACTS:

ESTIMATED VALUE: Up Front Savings
Revenues (Years) = _____

I. Executive Summary

II. Background

FIG. 208

III. Deal Structure

IV. Financial Analysis

V. Competitive Analysis

(1) Customers:

(2) Territory:

(3) Standardization:

FIG. 209

VI. Recommendation

	BUSINESS APPROVAL	LEGAL APPROVAL
Signature:	_____	_____
Printed Name:	_____	_____
Title:	_____	_____
Entity:	_____	_____
Date:	_____	_____

FIG. 210

MS Project Activity Sheet

Project Name: _____

Project Start Date: _____

Project Resources:

Product Mgr _____ Contract Mgr _____

Mktg Analyst _____ Mktg/Sales Rep _____

Instructions:

1. All updates in MS Project are made at the sub-task level only.
2. In the Task # field, enter the # of the task being updated or "new" if adding a task.
3. Find the column for the field you wish to update for the task and enter update information in the space provided.
4. Use the following guidelines for updating fields in MS Project:
   - Start/Finish Date - Change the duration of the appropriate task(s) to arrive at the new start/finish date
   - % Complete - Enter the new % complete for the task(s), either manually or using the up/down arrows
   - Deliverable - Change deliverable field to Yes, either manually or using the option in the drop down box

Task #	Start Date	Finish Date	% Comp	Del	Add/Delete Task (incl. info for all project fields)

FIG. 211

Opportunity Score Card

Scoring Date: _____ Scorer Initials: _____

Total Score:

Product/Project Name _____

Business Unit _____

Business Unit Primary Contact:

Name _____

Phone _____

IPMARK Primary Contact:

Name _____

Phone _____

Score Card Key Factors	Scoring & Explanation
1. MARKET POTENTIAL - Product viability (i.e. unique product, benefits, support/maintenance?) - Potential customers? - Few competitive products/suppliers? - Large market, low market saturation? High Potential - - - - - - - - - - - - - - - - Low Potential 10 9 8 7 6 5 4 3 2 1	Market Potential Rating:
2. PROJECT TIMEFRAME - Product developed & ready to market? - Ownership? Patent status? - Identified interested parties? - Deal simple or complex? - Anticipated time to sell/close/recognize $? Today - - - - 6 - - - - - 12 - - - - 18+ mths 10 9 8 7 6 5 4 3 2 1	Project Timeframe Rating:
3. PROJECTED REVENUE POTENTIAL - Anticipated total revenue from project? (if no strong customers, use 1X value) Over 5M - - 4M - - - - 1M - - - - - - 100K Under 10 9 8 7 6 5 4 3 2 1	Revenue Potential Rating:
4. COMPETITIVE THREAT TO BELLSOUTH - Sale give customer competitive advantage over BellSouth? No Threat - - - - - - - - - - - - - - - - High Threat 10 9 8 7 6 5 4 3 2 1	Competitive Threat Rating:
5. INTANGIBLE VALUE - Set stage for future big $ deals? - Build/foster relationship w/ existing/future customer? - Officer request/interest? - Public relations opportunity? High Profile - - - - - - - - - - - - - - - - Low Profile 10 9 8 7 6 5 4 3 2 1	Intangible Value Rating:
	TOTAL SCORE:

FIG. 212

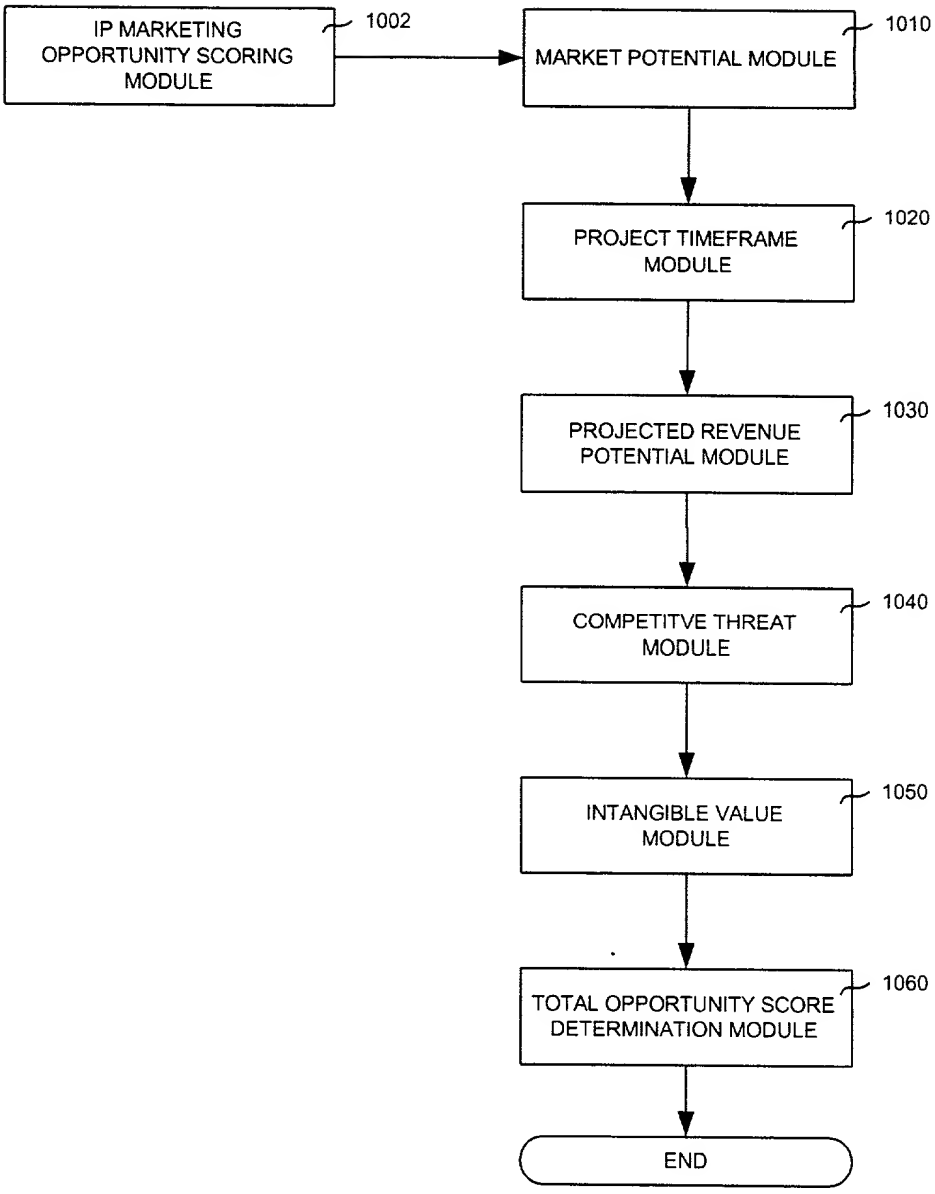

IP MARKETING OPPORTUNITY SCORING MODULE
1002
MARKET POTENTIAL MODULE
1010
PROJECT TIMEFRAME MODULE
1020
PROJECTED REVENUE POTENTIAL MODULE
1030
COMPETITVE THREAT MODULE
1040
INTANGIBLE VALUE MODULE
1050
TOTAL OPPORTUNITY SCORE DETERMINATION MODULE
1060
END

FIG. 213

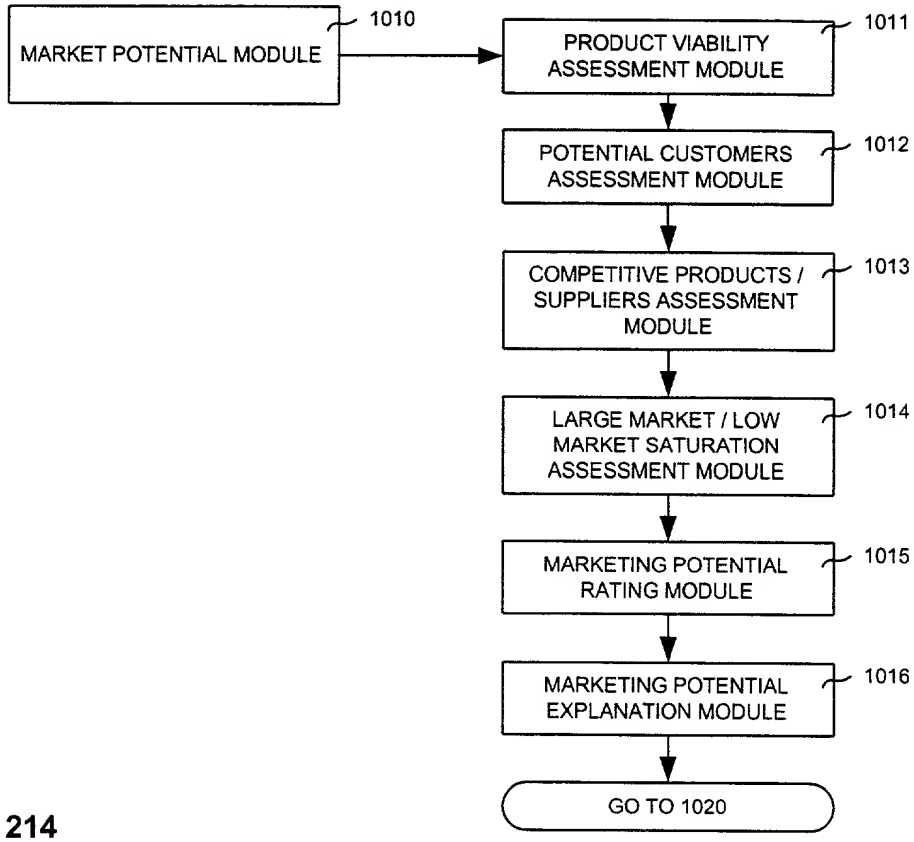


FIG. 214

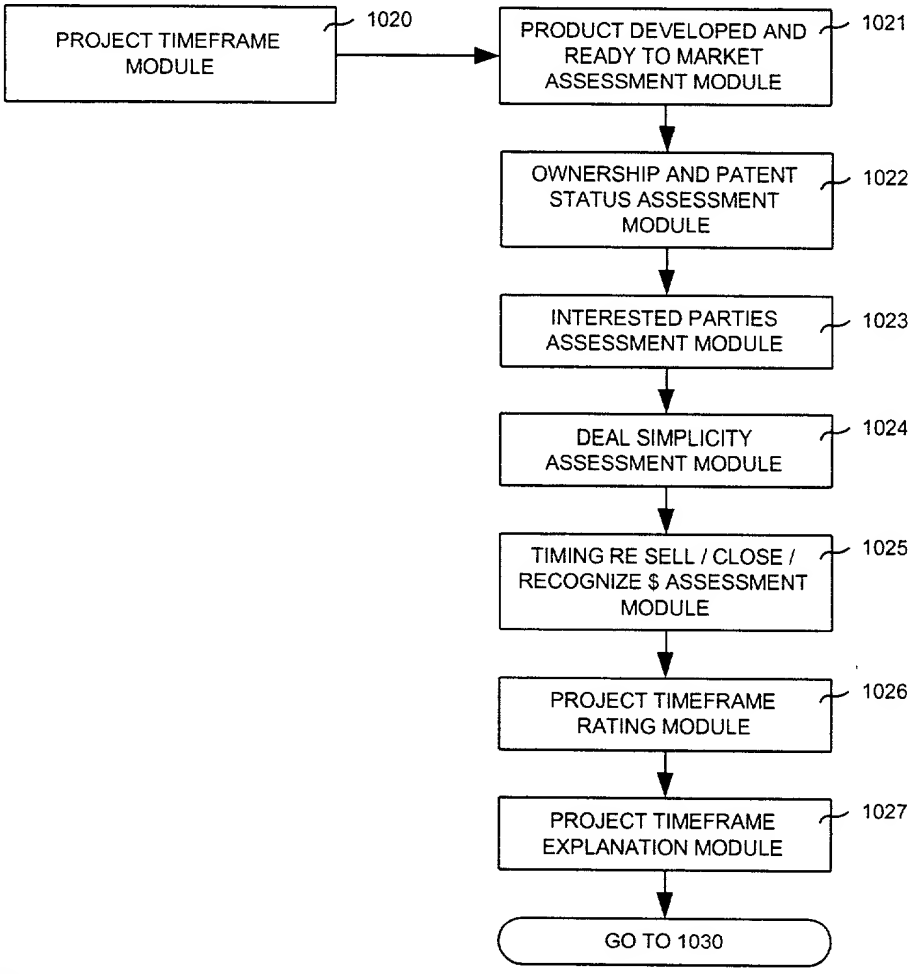


FIG. 215

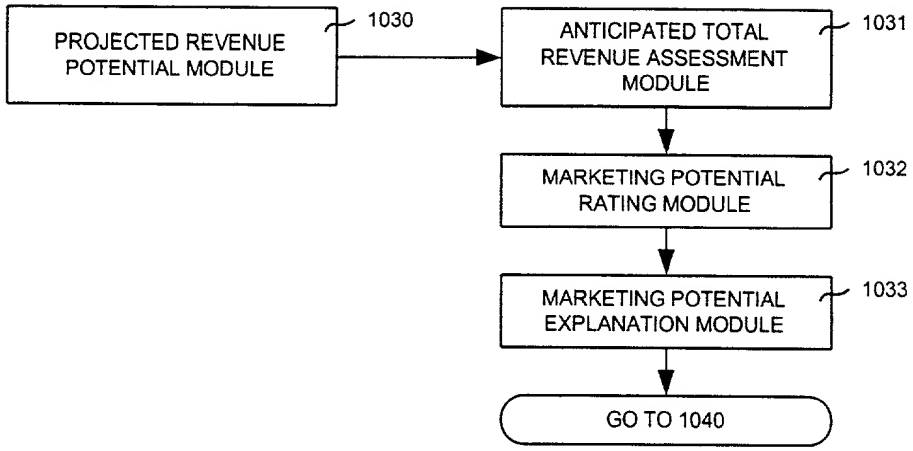


FIG. 216

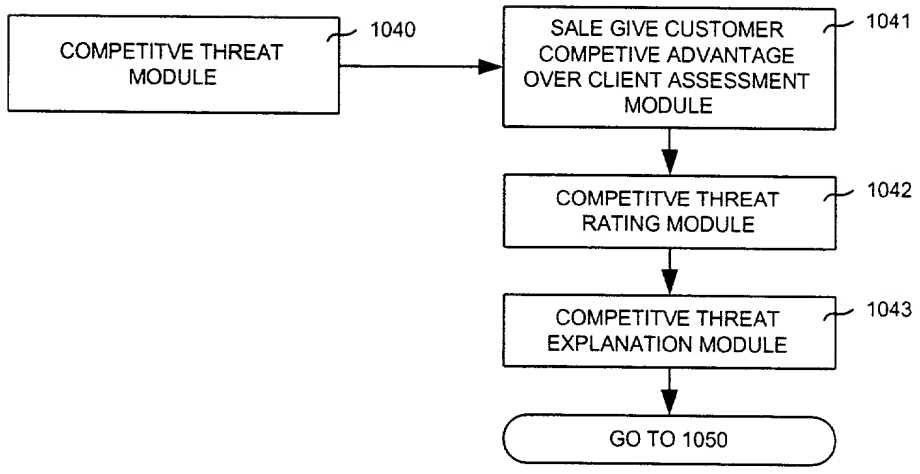


FIG. 217

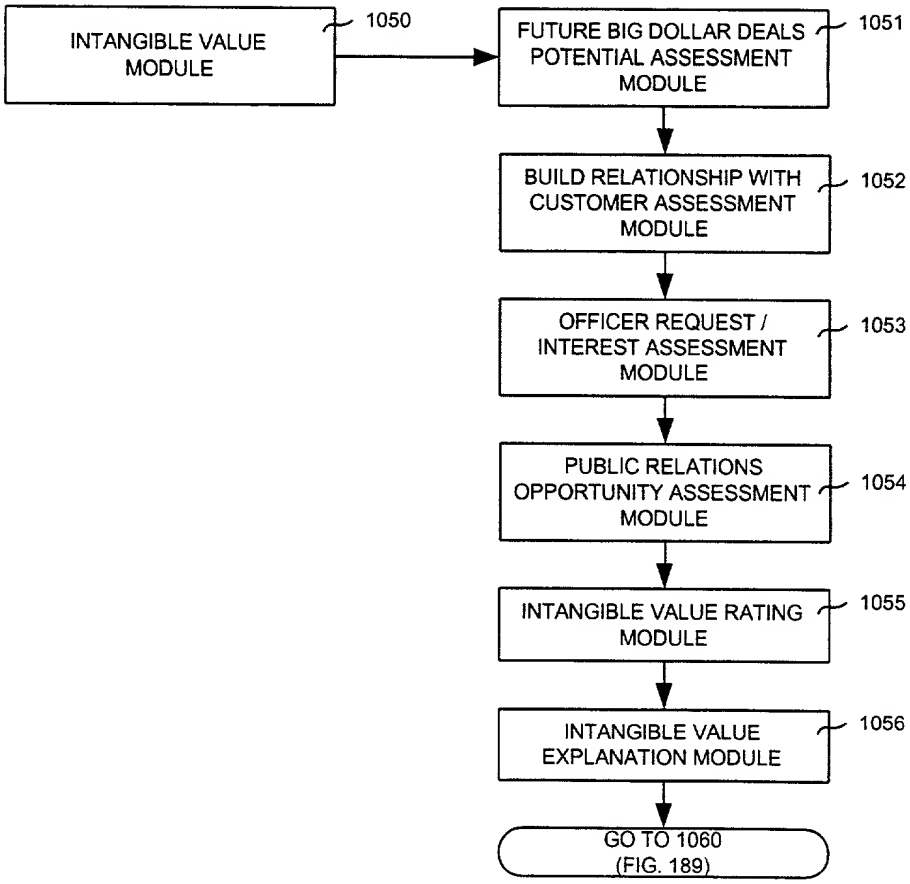

INTANGIBLE VALUE MODULE
1050
FUTURE BIG DOLLAR DEALS POTENTIAL ASSESSMENT MODULE
1051
BUILD RELATIONSHIP WITH CUSTOMER ASSESSMENT MODULE
1052
OFFICER REQUEST / INTEREST ASSESSMENT MODULE
1053
PUBLIC RELATIONS OPPORTUNITY ASSESSMENT MODULE
1054
INTANGIBLE VALUE RATING MODULE
1055
INTANGIBLE VALUE EXPLANATION MODULE
1056
GO TO 1060 (FIG. 189)

FIG. 218

INTELLECTUAL PROPERTY AWARDS PROGRAM

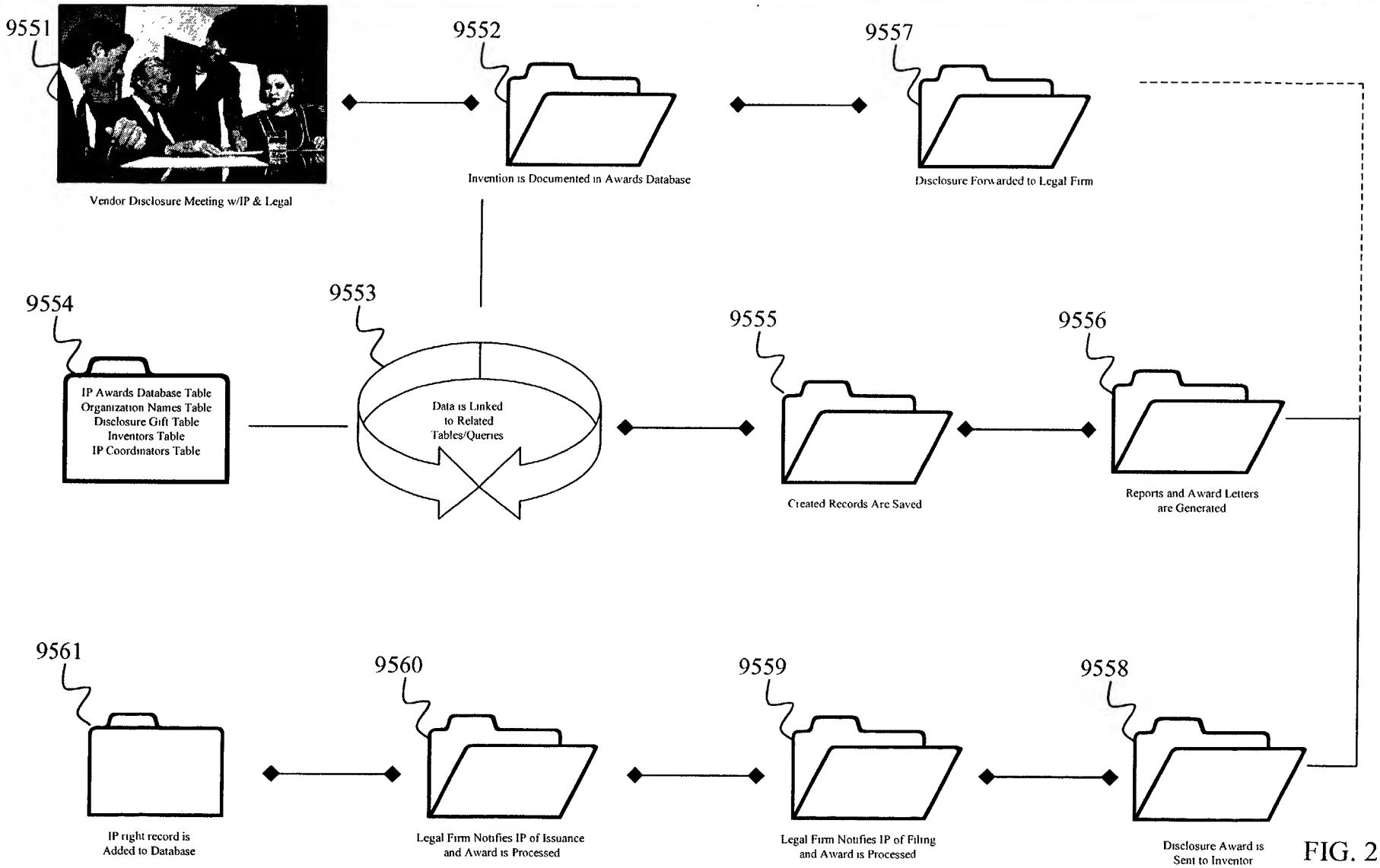


FIG. 219

>>> Company Intellectual Property>>
>> 10 Step Checklist

✓ Patents

- ❒ Work produced by Company employees or with Company resources has been assessed for patentibility if, at least one of the following occurred:
  - ⇨ Development of a new product, feature, process or software that seems unique
  - ⇨ Improvements to existing technology, product, process, or software
  - ⇨ Results that cut costs and/or improve efficiency
  - ⇨ Creation of a new business method

It is critical that employees bring their inventions to the attention of the Director of Technology (404) xxx-xxxx or the Technology Asset Manager (404) xxx-xxxx as soon as possible, and especially before any public disclosure of the invention!

✓ Trademarks

- ❒ The Company mark and subbrands have been used in accordance with the company's graphics standards to ensure that the significant value of the mark is not diluted.
- ❒ All subbrands have been cleared by the Director of Trademarks.
- ❒ All third party (such as agents, distributors, co-brand parties, and sponsored parties) use of Company's trademarks have been authorized in writing using language approved by Company Intellectual Property Marketing Corp.

Any questions regarding Graphics and Sponsorships should be brought to the attention of the Director of Corporate Identity (404) xxx-xxxx and other Trademark questions should be directed to the Director of Trademarks (404) xxx-xxxx.

✓ Copyrights

- ❒ Every Company work product created by an employee or by a vendor under a "work made for hire" contract have been properly marked with a copyright notice.

It is not necessary to register the copyright in order to place the copyright notice on the work.

Any questions regarding Copyrights should be brought to the attention of the Director of Administration (404) xxx-xxxx.

✓ Proprietary Information

- ❒ All proprietary information has been physically marked by its originator at the bottom center margin using the approved markings.
- ❒ All proprietary information has been securely stored and properly disposed.
- ❒ An NDA or IEA has been executed due to the necessity of sharing Company proprietary information in order to discuss or negotiate a potential business relationship, and:
  - ⇨ only the minimum amount of proprietary information necessary to facilitate our business purposes has been shared or received; and
  - ⇨ any necessary patent applications have been filed prior to such disclosures.

Any questions regarding proprietary information should be brought to the attention of the Director of Administration (404) xxx-xxxx.

✓ Ownership

- ❒ Before any development work to be done by an outside vendor (such as software, training courses or advertising) is begun, a specific written contract has been executed ensuring that Company will be the owner of the intellectual property rights in the developed technology, or work of authorship. *(see Executive Directive 12).*

Any questions regarding Ownership should be brought to the attention of the Vice President of Company Intellectual Property Management Corporation (404) xxx-xxxx.

✓ Marketing

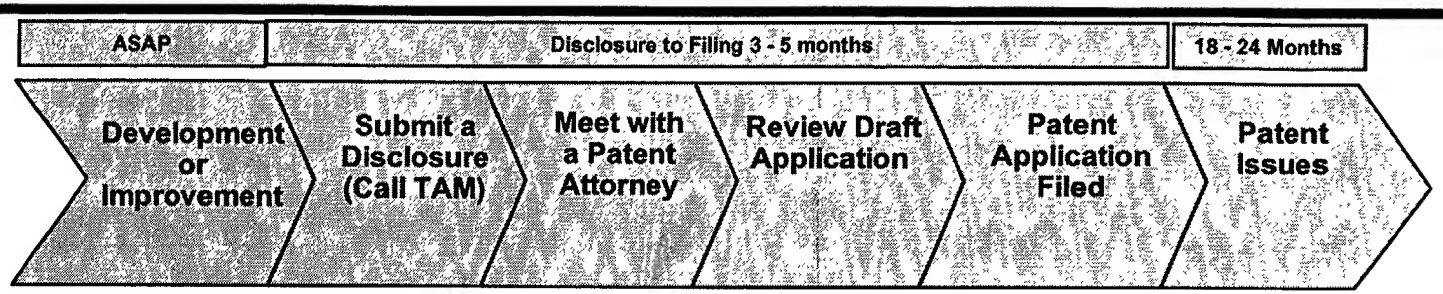
Company's policy is to maximize the value from its intellectual property.

- ❒ Opportunities to outmarket Company technology, software, systems, processes or other intellectual property to another company have been identified.

Any marketing opportunities should be brought to the attention of the Vice President of Company Intellectual Property Marketing Corporation (404) xxx-xxxx.

FIG. 220

Patent Process Life Cycle

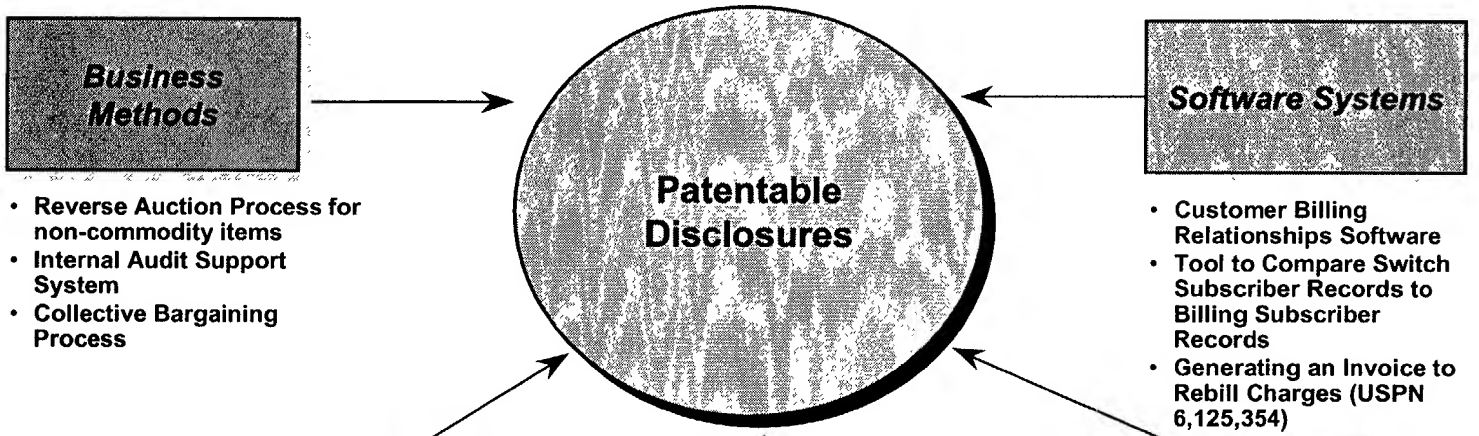


Task :	• Developments or Improvements created by company employees or with company resources should be brought to IP Protection's attention	• *Review for technical merit* • *Initial marketing potential analyzed* • *Administrative procedures addressed*	Disclose: • State of industry • Problem Solved • Sufficient detail such that someone of your expertise could replicate the invention	• Outside attorney will prepare at least 1 draft application Inventor reviews draft & provides comments		
Time Frame:	• We have 1 year from the time an invention is publicly used or disclosed in which to seek US patent protection	• 2-8 weeks for disclosure preparation for Outside Attorney	• Mtg: 1.5 - 2 hrs • Mtg scheduled 1-2 wks in advance • Outside attorneys are flown in for mtg	• Attorney Prep: 6-8 weeks • Inventor given 2 weeks to review & return to IP Protection	• 4 Weeks to receive official filing notice from the US Patent Office	• 12-18 months
Innovation Award:		• **Receive a Disclosure Gift**			• **Each inventor receives $1000**	• **Each inventor receives $2000**
Achievement Award:						• If this is an inventor's 5th company patent, he/she will receive an additional $2500 • 10th Issued Company Patent: Additional $5000 • >14th Issued Company Patent: Nominated for General Award

FIG. 221

Innovations

What's Patentable?



- Reverse Auction Process for non-commodity items
- Internal Audit Support System
- Collective Bargaining Process

- Customer Billing Relationships Software
- Tool to Compare Switch Subscriber Records to Billing Subscriber Records
- Generating an Invoice to Rebill Charges (USPN 6,125,354)

- Portable Radiotelephone w/ Sliding Cover (USPN 6,073,027)
- Coin Deflector for a Coin Receptacle (USPN 5,742,415)
- Subscriber Cell Phone Activation (USPN 5,812,953)

- Privacy Director
- Unified Messaging
- VoiceMail Visual Message Waiting Indication (USPN 5,363,431)

- Coverting Print Images to Internet Ready Images
- Debit Services System & Method for Wireless Systems (USPN 6,047,179)
- Dynamically Measuring Switch Traffic (USPN 6,011,838)

FIG. 222

Internal Auditor

Inventor

- **Identify innovations within your organization:**
  - Developed or improved a process or service?
  - Created a method of doing business?
  - Improved efficiency or cut costs?
- **Innovation:**
  - Developments or improvements by you, the employee or
  - Developments or improvements created with resources

IP Ambassador

- **Raising Awareness of Intellectual Property:**
  - Assist in the education of employees
  - Identify intellectual property risks to business objectives
  - Identify intellectual property controls to those risks
  - Where appropriate, suggest IP inclusion to organizations modifying their business process.

FIG. 223

Internal Audit & the Checklist

Sample Business Process

Business Objectives	**Transition Product to Trial Testing**	**Integrate Product w/ Current Service Offerings**	**Product to Market by Goal**	**Produce Savings**	**Decrease employee turnover ratio**
Potential Risks	• Delay in contract negotiations	• Vendor's architecture incompatible • Contract Disputes	• Project delayed by missed deadlines • Unable to market product as intended due to Trademark Issues	• Increased development al costs • Product released to <50% of Market in 2001 • Costly Overhead	• Employee Incentive Programs too costly • Access to Senior Mgt too bureaucratic • Limited Budget for Salary Increases
Controls	• Seek Patent Protection early • Ensure proprietary info properly marked	• Ensure Ownership • Seek Patent Protection • Ensure Proprietary Markings	• Contact Trademark & Corporate Identity Directors early in Process	• Identify outmarket opportunities	• Encourage innovation through the Innovation Awards Program

As an internal auditor, you can help educate the organization on the importance of intellectual property.

FIG. 224

90% of All Revenues Are Credited towards the Entity That Owns the IP Asset

Product licensing is a simple process:

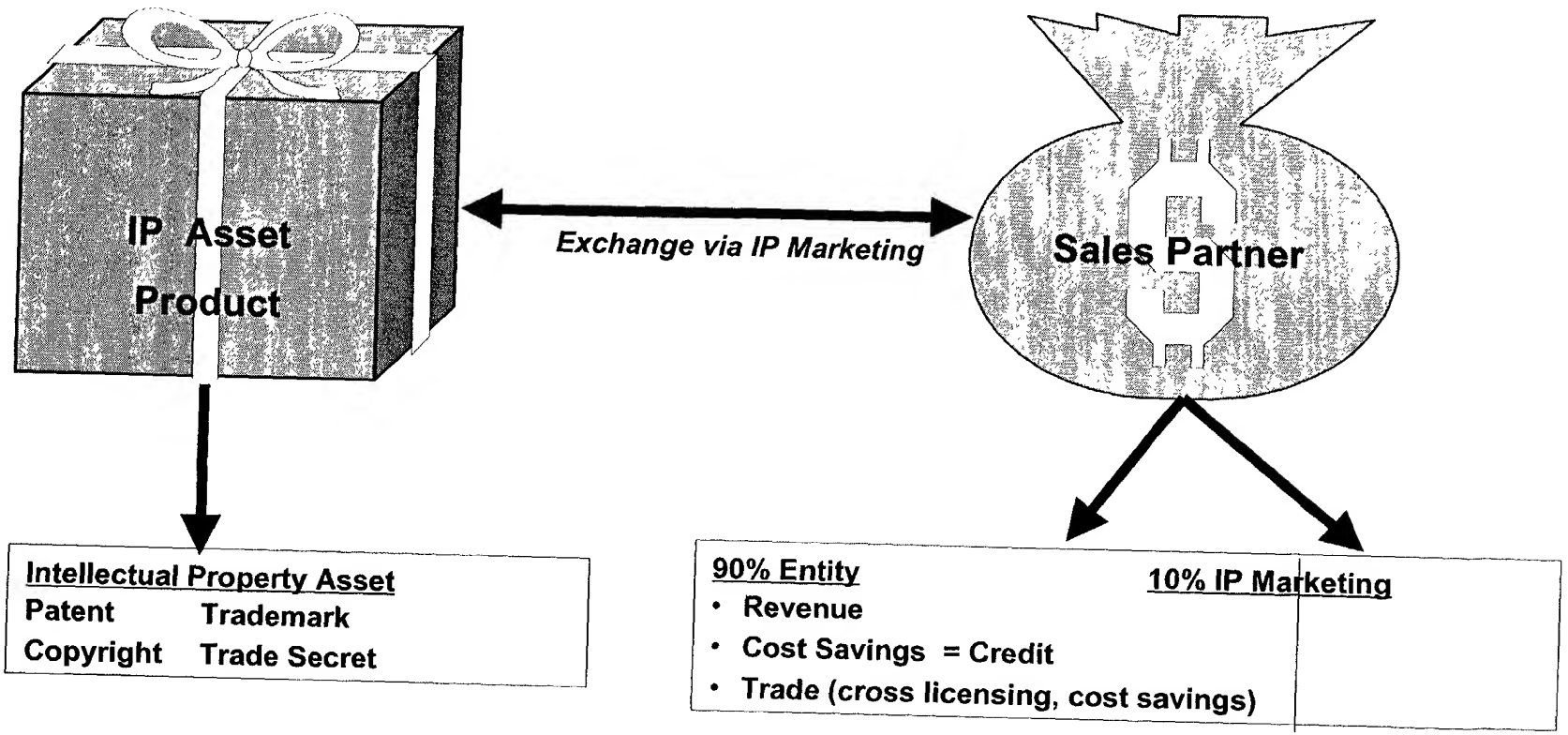


FIG. 225

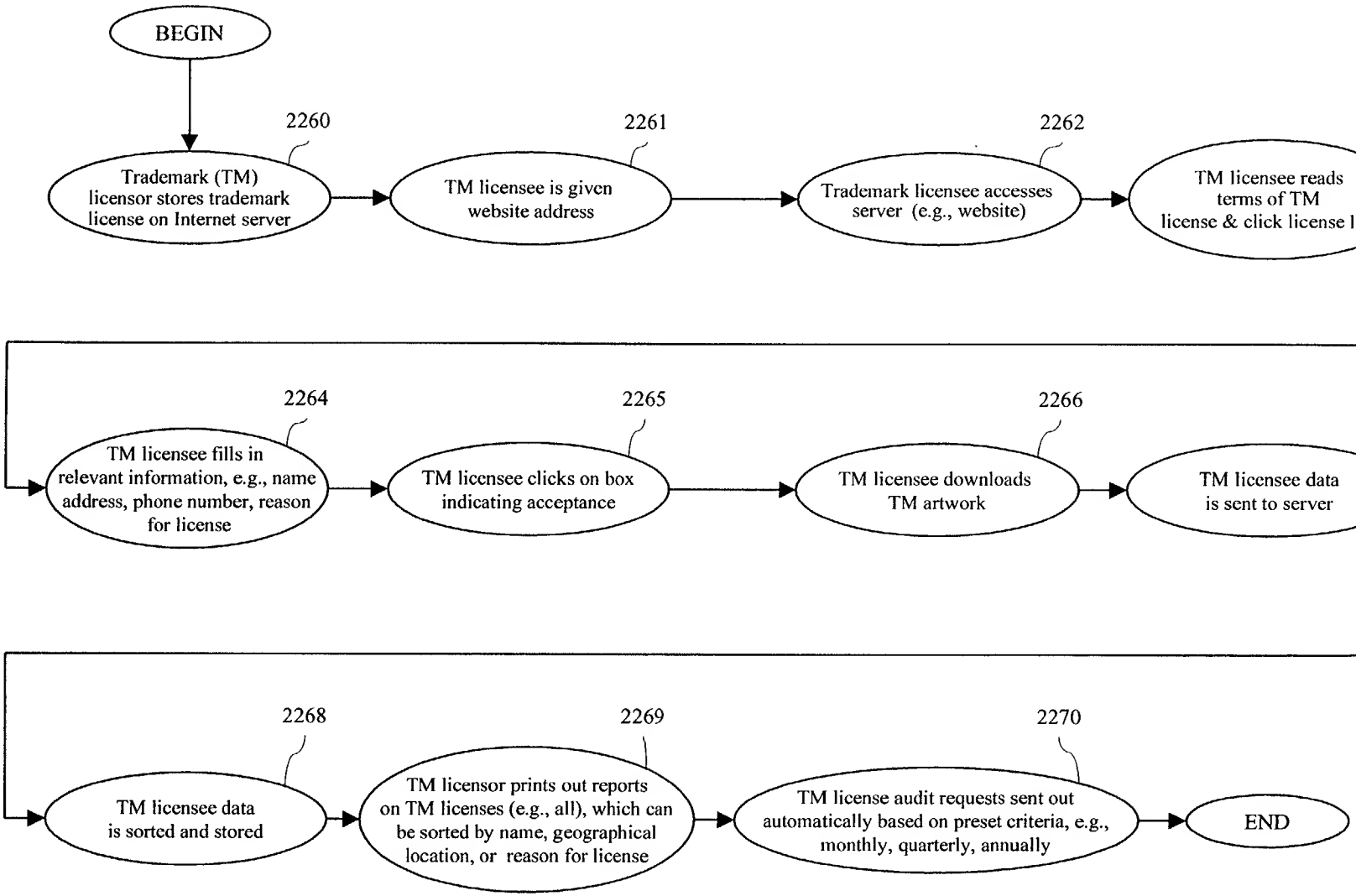

BEGIN
2260
Trademark (TM) licensor stores trademark license on Internet server
2261
TM licensee is given website address
2262
Trademark licensee accesses server (e.g., website)
2263
TM licensee reads terms of TM license & click license link
2264
TM licensee fills in relevant information, e.g., name address, phone number, reason for license
2265
TM licensee clicks on box indicating acceptance
2266
TM licensee downloads TM artwork
2267
TM licensee data is sent to server
2268
TM licensee data is sorted and stored
2269
TM licensor prints out reports on TM licenses (e.g., all), which can be sorted by name, geographical location, or reason for license
2270
TM license audit requests sent out automatically based on preset criteria, e.g., monthly, quarterly, annually
END

FIG. 226